



**Schools Forum**

**Wednesday, 13 July 2022 4.00 p.m.  
To be held remotely - contact Clerk for  
access**

A handwritten signature in black ink that reads 'S. Young'.

**Chief Executive**

*Please contact Ann Jones - Tel: 0151 511 8276 or email:  
ann.jones@halton.gov.uk for further information.  
The next meeting of the Committee is on Wednesday, 19 October 2022*

**ITEMS TO BE DEALT WITH  
IN THE PRESENCE OF THE PRESS AND PUBLIC**

**Part I**

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***In accordance with the Health and Safety at Work Act the Council is required to notify those attending meetings of the fire evacuation procedures. A copy has previously been circulated to Members and instructions are located in all rooms within the Civic block.***

**SCHOOLS FORUM**

*At a meeting of the Schools Forum on Wednesday, 16 February 2022 held remotely*

Present: Councillor T. McInerney (Observer)  
 A. Jones, Democratic Services, HBC  
 A. Jones, Financial Management, HBC  
 N Shafiq, Financial Management, HBC  
 R. Sprigings, Financial Management, HBC  
 A. Leach, Education, Inclusion & Provision  
 M. West, Education, Inclusion & Provision  
 K. Landrum, (Chair) Primary School with a Nursery Representative  
 J. Coughlan, Primary Representative - Infant School  
 N. Hunt, Pupil Referral Unit Representative  
 E. Haver, Special Academy Representative  
 A. Sheppard, VA Schools Representative  
 J. McConville, Secondary Academy Representative  
 I. Critchley, All Through Schools Representative  
 C. Dalton, Secondary Academy Representative  
 C. Liku, Community Nursery Schools Representative  
 A. Evans, Community Secondary Governor Representative (Sub)

*Action*

## SCF18 APOLOGIES FOR ABSENCE

Apologies were received from Thalia Bell, Jim Wilson (named substitute Andrew Evans attended for part) and Heather Austin.

## SCF19 MINUTES

The minutes of the meeting held on 19 January 2022 were agreed as a correct record.

## SCF20 DEDICATED SCHOOLS GRANT (DSG) OUTTURN 2021-22

The Forum received the Dedicated Schools Grant (DSG) forecast outturn for 2021-22.

It was reported that the DSG allocation for 2021-22 was £130,991,359 and was broken down as follows:

Schools Block	£99,050,733
CSSB	£ 698,973
Early Years Block	£ 9,862,865
High Needs Block	£21,378,788

The report provided details on the status for each of the above blocks and Appendix A presented a detailed

breakdown of the budgets, forecast and variances. It was noted that the in year position of the DSG balance for 2021-22 was forecast to be £1,783,410 in deficit; add to this the deficit balance from 2020-21 of £995,742, this gave a total deficit of £2,779,152.

RESOLVED: That the report is noted.

SCF21 CENTRAL SCHOOLS SERVICES BLOCK (CSSB)  
BUDGETS 2022-23

The Forum received the Central School Services Block (CSSB) funding for 2022-23.

The grant allocation to the CSSB for 2022-23 was £728,189. The proposed budgets to be funded from the CSSB were presented in paragraph 3.2, against the budget amounts for the previous year.

It was noted that there was an 6.4% decrease in the charge for licences for maintained schools, which were purchased by the DfE and recharged to local authorities.

It was proposed that the unallocated balance of £156,359 be set to the DSG contingency until later in the year, when it could be decided how best it could be used; this was agreed.

RESOLVED: That Schools Forum

- 1) notes the report; and
- 2) agree the Central School Services Block budgets.

SCF22 HIGH NEEDS BLOCK FUNDING FOR 2022-23

The Forum received the High Needs Block grant allocation for 2022-23, which was £19,874,222 after recoupment for per place funding in academies and independent special schools.

Representatives were advised that the 1% transfer request from the Schools Block to the High Needs Block had now been approved by the DfE, this equated to £1,013,903.90. As per the consultation, £250,000 would be used to fund *Invest to Save* projects, with the balance being used to offset the deficit DSG balance.

The DfE had provided an additional £864,263 into the High Needs Block of the DSG to cover the Health and Social

Care Levy and wider costs. The purpose of the Levy and its proposed utilisation was outlined in the report.

With reference to Appendices A, B, C and D mentioned in the report, these were sent to Forum Representatives prior to the meeting for consideration and Representatives were asked to agree the centrally retained budgets in Appendix D.

Clarity was provided on placements at schools' resource bases for pupils with SEND and the funding procedure when the base was not full. The Special Academy Representative raised a query regarding some teachers being employed on term time only contracts as opposed to being paid yearly, commenting that must affect budgets so parity across all schools was needed. Officers would look into this and set up a meeting after half term.

RESOLVED: That Schools Forum

- 1) notes the report; and
- 2) agree the centrally retained budgets.

Operational  
Director -  
Education, and  
Inclusion  
Provision

#### SCF23 EARLY YEARS BLOCK FUNDING FOR 2022-23

The Forum received the Early Years Block funding for 2022/23.

Officers advised that the Dedicated Schools Grant (DSG) settlement was announced on 17 December 2021, giving an indicative allocation of £9,355,753 for the Early Years Block. Halton was continuing to follow the Early Years funding formula with a universal base rate for all sectors, a deprivation factor using IDACI (*Income Deprivation Affecting Children Index*) and the quality factor for staff across all sectors who were qualified at Level 5 and above.

It was announced that the hourly rate received by Halton from the DfE for the provision of free entitlement to 3 and 4 year olds remained at £5.12 and the rate for the provision of free entitlement to 2 year olds had increased by 21 pence per hour to £5.65. The Forum was disappointed with the lack of increase in funding for 3 and 4 year olds.

Since the publication of the agenda, work on the funding formula had started and this was presented to the Forum, together with the proposed centrally retained budgets, which the Forum was asked to approve.

Officers advised that the Authority was unlikely to see any increase to the hourly rate for 3 and 4 year old provision for another few years. Therefore, unless the calculations for 2023-24 allowed the Authority to fund at the current level without incurring any further deficit balance, there may be a need to reduce the rates passed onto providers.

RESOLVED: That Schools Forum

- 1) notes the report; and
- 2) agree the centrally retained budgets.

#### SCF24 HALTON BEHAVIOUR SUPPORT SERVICE

The Forum considered a report from Behaviour Support Service, which provided an impact report on the Service.

It was reported that the Behaviour Support Service is funded through the Dedicated Schools Grant, as agreed by Schools Forum, and comprised Head of the Behaviour Support Team, a Primary Behaviour Support Teacher, Secondary Behaviour Support Teacher and two family liaison officers.

The service operated with schools to ensure that staff received training to ensure that positive behaviour policies and strategies were used throughout the school consistently. *Team Tech* was delivered to support de-escalation and mental health first aid training helped support children, young people and staff with their own mental health and wellbeing. These positive behaviour strategies aimed to reduce matters escalating which could lead to exclusions and to help retain children and young people within a mainstream schools setting, where that was appropriate. The service also supported schools staff as part of their continuing professional development in relation to positive behaviour management.

It was noted that since the beginning of the pandemic some of the work of the team had been impacted due to restrictions with accessing schools. Now restrictions had been lifted this has improved.

Appended to the report were details of the training and support provided to schools and the benefits of this could be seen through feedback received from schools.

The Forum welcomed the report but considered the

*Statement of Impact Evidence Base* to be anecdotal. They requested that KPIs be included, as they were for the SEMH outreach for the Bridge School. These would be of more value to schools in determining the impact of the service across primary and secondary settings. Headteachers to agree with the Divisional Manager – Education, an appropriate set of KPIs.

RESOLVED: That the report is noted.

Operational  
Director -  
Education, and  
Inclusion  
Provision

*Meeting ended at 4.45 p.m.*

**REPORT TO:** Schools Forum

**DATE:** 13th July 2022

**REPORTING OFFICER:** Operational Director - Finance

**SUBJECT:** DSG Outturn for 2021-22

**WARDS:** Borough wide

### 1.0 PURPOSE OF THE REPORT

To report to the Schools Forum the Dedicated Schools Grant Outturn for 2021-22.

### 2.0 RECOMMENDATION: That

- 2.1 The deficit balance of DSG from 2021-22 of £1,856,222 is carried forward into the 2022-23 financial year to be noted by Schools Forum.
- 2.2 That a decision is made on the treatment of the unspent Schools delegated contingency budget that has been carried forward into 2022-23.

### 3.0 SUPPORTING INFORMATION

#### 3.1 Grant settlement

The final amount of DSG allocated to Halton for 2021-22 was £130,991,359 split as follows:

Schools Block	£99,050,733
CSSB	£698,973
Early Years Block	£9,862,865
High Needs Block	£21,378,788

#### 3.2 DSG Expenditure

##### **Schools Block:**

No transfer to the High Needs Block was requested for 2021-22 so the full amount of £99,050,733 was devolved to mainstream primary and secondary schools and academies through the funding formula.

##### **High Needs Block:**

The actual overspend for HN block came to £766,634 which is significantly lower than the forecasted outturn. It has been identified that some costs relating to 2021-22 have only been paid in 2022-23. The key areas of overspend include the Independent Special Schools which was overspent by £811,098 and Inter Authority costs which was overspent by £89,691. There have been underspends across other



areas of the High Needs Block, totalling £290,359 which have helped to offset the overspend.

**Early Years Block:**

The Early Years block has been shown as balanced. The actual spend was £9,121,006, some £984,220 under budget. However, the estimated recovery of Early Years block grant is £983,644 so we would be left with an underspend of £576 if the estimate is correct. This final grant adjustment for 2021-22 should be announced in July, but the actual date is uncertain.

**Central School Services Block:**

The Central School Services Block has come in over budget by £93,846. This is due to a shortfall of Exclusions and Inter Authority income. We have shown the Schools De-delegated contingency budget of £192,590 as fully spent in order that it can be ring-fenced and carried forward into 2022-23, as we did with the £100,387 of unspent Schools contingency last year. A decision needs to be made whether this total unspent de-delegated contingency is to remain ring-fenced as a Schools contingency budget available in 2022-23.

A breakdown of the 2021-22 outturn position is shown in Appendix A.

3.3 Outturn position

In-year DSG has overspent by £860,480 and taking into consideration the carry forward deficit balance of £995,742 from the previous financial year we have a total DSG deficit of £1,856,222 to be carried forward into 2022-23.

**4.0 FINANCIAL IMPLICATIONS**

4.1 The Council is required to ensure that DSG funding is allocated in accordance with the regulations attached to each block of DSG. The balance of unspent DSG as at 31<sup>st</sup> March 2021 will contribute towards budget pressures in 2022-23.

**5.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES**

**5.1 Children & Young People in Halton**

It is essential that schools and education support services receive sufficient funding to allow them to support all children and young people.

**5.2 Employment, Learning & Skills in Halton**

None.

**5.3 A Healthy Halton**

None.

**5.4 A Safer Halton**

None.

**5.5 Halton's Urban Renewal**

None.

**6.0 RISK ANALYSIS**

6.1 The Council will continue to closely monitor the level of DSG spend throughout the year to mitigate against the risk of overspend against available funding.

**7.0 EQUALITY AND DIVERSITY ISSUES**

7.1 The Local Authority must discharge its statutory responsibilities in relation to all schools and settings.

## DSG Forecast Outturn for 2021-22

## Appendix A

Summary	Original budget	Current budget	Actual Outturn		
Schools Block	£ 99,050,733	£ 99,050,733	£ 99,050,733	£	-
Central Schools Services Block	£ 698,973	£ 698,973	£ 792,819	-£	93,846
Early Years Block	£ 9,862,865	£ 10,105,226	£ 10,105,226	-£	0
High Needs Block	£ 18,554,788	£ 18,190,954	£ 18,957,588	-£	766,634
DSG carry forward (central)	-£ 995,742	-£ 995,742	£ -	-£	995,742
<b>Total DSG</b>	<b>£ 127,171,617</b>	<b>£ 127,050,144</b>	<b>£ 128,906,366</b>	<b>-£</b>	<b>1,856,222</b>

overspend

Schools Block					Variance	
Primary (before de-delegation)	£	50,660,610	£	50,660,610	£	-
Secondary (before de-delegation)	£	48,390,123	£	48,390,123	£	-
<b>Total Schools Block</b>	<b>£</b>	<b>99,050,733</b>	<b>£</b>	<b>99,050,733</b>	<b>£</b>	<b>-</b>

**Central Schools Services Block**

Safeguarding post contribution	£	48,190	£	48,190	£	50,081	-£	1,891
Safeguarding income from schools	-£	18,050	-£	18,050	£	-	-£	18,050
Licences	£	116,560	£	116,560	£	116,565	-£	5
Teachers Panel	£	19,460	£	19,460	£	-	£	19,460
Premature Retirement costs	£	501,930	£	501,930	£	475,661	£	26,269
CSSB Contingency	£	127,500	£	127,493	£	66,034	£	61,459
Exclusions Income	-£	149,040	-£	149,040	-£	16,152	-£	132,888
Inter Authority Income	-£	252,890	-£	252,890	-£	96,027	-£	156,863
Staff Responsibilities (de-del)	£	24,710	£	24,710	£	18,091	£	6,619
FSM Eligibility contribution (de-del)	£	6,570	£	6,570	£	6,570	£	-
Dismissals Costs (de-del)	£	120,900	£	120,900	£	38,931	£	81,969
Schools Contingency (de-del)	£	192,590	£	192,590	£	192,590	£	-
DSG Contingency	£	-	£	-	£	-	£	-
De-delegated income	-£	344,770	-£	344,770	-£	344,770	£	-

Former ESG Retained Duties

Revenue budget preparation/Formulation and review of LA schools funding formula	£	84,140	£	84,140	£	84,140	£	-
Director of children's services/Planning for the education service as a whole	£	89,610	£	89,610	£	67,849	£	21,761
Admissions service contribution	£	9,070	£	9,070	£	10,377	-£	1,307
SACRE	£	2,980	£	2,980	£	2,980	£	-
Investigation of Complaints contribution	£	8,560	£	8,560	£	8,560	£	-
Administrative costs and overheads	£	110,960	£	110,960	£	110,960	£	0

Former ESG General Duties

Budgeting and accounting functions relating to ma	£	22,050	£	22,050	£	22,050	£	-
Asset Management contribution	£	46,810	£	46,810	£	47,188	-£	378
Health & Safety contribution	£	61,200	£	61,200	£	61,200	£	-
De-delegated income	-£	130,060	-£	130,060	-£	130,060	£	-

<b>Total Central Schools Services Block</b>	<b>£</b>	<b>698,980</b>	<b>£</b>	<b>698,973</b>	<b>£</b>	<b>792,819</b>	<b>-£</b>	<b>93,846</b>
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**Early Years Block**

Nursery Schools	£	1,019,176	£	1,019,176	£	948,887	£	70,289
Nursery Units	£	392,826	£	392,826	£	421,479	-£	28,653
PVI - 3 & 4 yo provision	£	6,160,490	£	6,160,490	£	5,884,224	£	276,266
Early Years Pupil Premium & DAF	£	190,500	£	190,500	£	158,694	£	31,806
2 yo provision	£	1,326,430	£	1,326,430	£	1,427,410	-£	100,980
EYFS Business Rates	£	24,210	£	24,210	£	23,388	£	822
EY SEN Inclusion Fund	£	40,000	£	40,000	£	37,127	£	2,873
Staffing - 2, 3 & 4 yo provision	£	168,740	£	168,740	£	169,280	-£	540
Supplies & Services - 2, 3 & 4 yo provision	£	7,000	£	7,000	£	518	£	6,482
Contribution to IWIST	£	50,000	£	50,000	£	50,000	£	-
EY contingency	£	483,490	£	725,854	£	984,220	-£	258,366

<b>Total Early Years Block</b>	<b>£</b>	<b>9,862,862</b>	<b>£</b>	<b>10,105,226</b>	<b>£</b>	<b>10,105,226</b>	<b>-£</b>	<b>0</b>
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**High Needs Block**

Special Schools & Academies	£	5,934,886	£	5,934,886	£	5,934,886	£	-
Resource Bases	£	1,150,461	£	1,150,461	£	1,150,461	£	-
PRU	£	1,643,271	£	1,643,271	£	1,643,271	£	-
Top-up funding	£	1,872,080	£	1,872,080	£	2,068,851	-£	196,771
Special Schools Equipment	£	20,000	£	20,000	£	10,424	£	9,576

Specialist Provision:					£	-		
Visually Impaired	£	118,410	£	93,090	£	72,112	£	20,978
Cognition & Learning	£	125,240	£	125,240	£	126,851	-£	1,611
Communication, Language & ASD	£	106,850	£	149,890	£	138,914	£	10,976
Hearing Impaired	£	227,600	£	227,600	£	243,170	-£	15,570
Home Tuition	£	300,670	£	300,670	£	251,955	£	48,715
Education Psychology Service	£	288,250	£	288,250	£	257,053	£	31,197
Independent Special Schools	£	4,452,830	£	4,452,830	£	5,263,928	-£	811,098
Inter-Authority Recoupment	£	382,670	£	382,670	£	472,361	-£	89,691
Post 16 Provision	£	969,000	£	969,000	£	890,038	£	78,962
Behaviour Support Team	£	343,700	£	343,700	£	279,019	£	64,681
HN Contingency	£	-	-£	363,834	-£	412,007	£	48,173
Inclusion Division staffing	£	554,130	£	536,410	£	519,587	£	16,823
Inclusion Division Supplies & Services/SLAs	£	64,740	£	64,740	£	46,713	£	18,027
<b>Total High Needs Block</b>	<b>£</b>	<b>18,554,788</b>	<b>£</b>	<b>18,190,954</b>	<b>£</b>	<b>18,957,588</b>	<b>-£</b>	<b>766,634</b>

**REPORT TO:** Schools Forum

**DATE:** 13<sup>th</sup> July 2022

**REPORTING OFFICER:** Operational Director - Finance

**SUBJECT:** School Balances 2021-22

**WARDS:** Borough wide

## **1.0 PURPOSE OF THE REPORT**

- 1.1 To report to the Schools Forum the level of funding brought forward from 2021-22 by Halton Maintained Schools.

## **2.0 RECOMMENDATION: That**

- 2.1 The report is noted.
- 2.2 That the Schools Forum decides if any schools are to provide further information regarding their high balance.

## **3.0 SUPPORTING INFORMATION**

- 3.1 While balances are still reported to the Schools Forum, no excess surplus balance limits are in place. However, the Schools Forum retains the right to require schools to provide further information as to how their balance will be spent should they so decide.
- 3.2 The Individual School Budget balances for Halton maintained schools at the end of 2021-22 is £7,706,982. This is an increase of £607,724 compared to the balances for 2020-21. All the schools ended up with a surplus balances (albeit of differing amounts) apart from The Bridge Astmoor Skill Centre which ended up with a £664,047 deficit.
- 3.3 However, taking into consideration the main PRU which is the Bridge School ending up with a surplus balance of £490,307 combining both gives a total deficit balance for the whole PRU provision of £173,740.
- 3.4 For the maintained nursery schools, balances have decreased by £52,461 to £92,137.
- 3.5 For maintained primary schools, balances have decreased by £19,687 to £6,496,117.
- 3.6 For maintained secondary schools, balances have increased by £377,470 to £570,581.

- 3.7 For maintained special schools, balances have increased by £302,402 to £548,147.
- 3.8 Appendix A shows the balances for each maintained school, along with their 2020-21 balance for comparison.
- 3.9 The balances of Devolved Formula Capital grant for maintained schools has decreased by £52,840 to £207, 909.
- 3.10 Appendix B shows the balances for each maintained school, along with their 2020-21 balance for comparison.

#### **4.0 FINANCIAL IMPLICATIONS**

- 4.1 It is pleasing to note that overall school balances have increased slightly from the previous year but have not been to the level seen in the previous year. This is in part due to inflation and higher costs being borne by schools impacting particularly both the Nursery and Primary sectors.

#### **5.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES**

- 5.1 **Children & Young People in Halton**  
It is essential that schools receive sufficient funding to allow them to support all children and young people.
- 5.2 **Employment, Learning & Skills in Halton**  
None.
- 5.3 **A Healthy Halton**  
None.
- 5.4 **A Safer Halton**  
None.
- 5.5 **Halton's Urban Renewal**  
None.

#### **6.0 RISK ANALYSIS**

- 6.1 Schools continue to face increasing cost pressures and there is a risk that potentially schools will face financial difficulties going forwards due to an upward trend of rising costs evident within key budget areas. Controlled fiscal management of budgets will have to be prioritised by schools.

#### **7.0 EQUALITY AND DIVERSITY ISSUES**

- 7.1 None.

**Maintained School Balances 2020-21****Appendix A**

	2021-22	2020-21
Nursery Schools		
5001 Ditton Nursery School	882	46,282
5002 Birchfield Nursery School	11,115	14,464
5003 Warrington Road Nursery School	80,140	83,852
<b>Nursery Total</b>	<b>92,137</b>	<b>144,598</b>
Primary Schools		
5100 St Mary's CE Primary	420,230	362,411
5101 St Edwards Catholic Primary	140,130	131,006
5102 Weston Point Community Primary	236,761	244,557
5105 Victoria Road Primary School	165,568	150,101
5106 Weston Primary School	84,484	134,670
5107 St Clements Catholic Primary School	63,817	75,508
5108 Westfield Primary School	38,874	117,287
5109 Halton Lodge Primary School	82,027	130,765
5110 Castle View Primary School	173,895	142,160
5111 Astmoor Primary School	17,392	23,116
5112 The Brow Community Primary	290,711	219,132
5113 Woodside Primary School	126,108	156,092
5114 The Holy Spirit Catholic Primary	38,852	74,604
5116 Pewithall Primary School	68,492	71,653
5118 Hallwood Park Primary School	131,461	97,331
5120 Runcorn All Saints Ce Primary	80,423	55,246
5121 Our Lady Mother of the Saviour Catholic Primary	263,432	222,782
5122 Hillview Primary School	106,231	107,655
5123 Beechwood Primary School	66,684	67,844
5125 Brookvale Primary School	432,051	394,374
5126 St Martins Cath Primary School	1,859	30,022
5127 Murdishaw West Comm Primary School	138,649	99,160
5128 Gorsewood Primary School	299,762	247,318
5129 St Berteline's CE Primary	79,917	163,494
5130 Windmill Hill Primary School	292,761	293,891
5132 Moore Primary School	144,648	113,233
5133 Hale CE Vol Contr Primary	54,137	94,903
5134 St Bedes Catholic Junior School	125,124	109,959
5135 St Bedes Catholic Infant School	91,263	177,666
5137 St Michael's Catholic Primary School	148,716	169,207
5138 Farnworth CE Controlled Primary	190,148	150,330
5139 Halebank CE Voluntary Controlled Primary	141,030	175,798
5140 St Gerard's Catholic Primary & Nursery	269,719	227,341
5144 Oakfield Primary School	198,092	143,266
5146 Moorfield Primary School	49,485	72,069
5148 Our Lady Of Perpetual Succour Primary	142,113	121,201
5149 St Basils Catholic Primary	367,911	292,750
5150 All Saints Upton CE Voluntary Controlled Primary	73,040	49,786
5151 Fairfield Primary	252,673	298,901
5153 Lunts Heath Primary School	217,499	191,564
5154 St John Fisher Catholic Primary	189,948	315,649

<b>Maintained Primary Total</b>	<b>6,496,117</b>	<b>6,515,804</b>
Secondary Schools		
5301 St Chads Catholic High School	273,790	(94,723)
5312 St Peter & Paul Catholic High	470,531	415,098
5313 The Bridge School PRU	490,307	365,507
5315 The Bridge - Astmoor Skill Centre	(664,047)	(492,770)
<b>Maintained Secondary Total</b>	<b>570,581</b>	<b>193,112</b>
Special Schools		
5401 Ashley School	234,924	38,628
5402 Chesnut Lodge Special School	313,222	207,116
<b>Maintained Special Total</b>	<b>548,147</b>	<b>245,744</b>
<b>Grand Total</b>	<b>7,706,982</b>	<b>7,099,258</b>



**Devolved Formula Capital Grant year end balances 2021-22**

## Appendix B

2021-22    2020-21

## Nursery Schools

5591 Ditton Nursery Non LMS	56	6,104
5592 Birchfield Nursery Non LMS	0	947
5593 Warrington Road Non LMS	(2,103)	130
<b>Maintained Nursery DFC Total</b>	<b>(2,047)</b>	<b>7,181</b>

## Primary Schools

5502 Weston Point Non LMS	4,670	18,923
5505 Victoria Road Non LMS	1,842	1,152
5506 Weston Non LMS	4,856	9,842
5508 Westfield Non LMS	650	779
5509 Halton Lodge Non LMS	8,636	12,039
5510 Castle View Non LMS	12,167	6,594
5511 Astmoor Non LMS	16,460	11,094
5512 The Brow Non LMS	10,328	7,431
5513 Woodside Non LMS	(5,419)	10,894
5516 Pewithall Non LMS	1,024	370
5518 Hallwood Park Non LMS	5,059	9,817
5522 Hillview Non LMS	6,078	2,981
5523 Beechwood Non LMS	6,383	3,522
5525 Brookvale Primary Non LMS	5,676	9,288
5527 Murdishaw West Non LMS	3,110	379
5528 Murdishaw Gorsewood Non LMS	11,334	10,009
5530 Windmill Hill Non LMS	17,259	11,363
5532 Moore Non LMS	13,006	6,632
5533 Hale Non LMS	0	20,628
5538 Farnworth Non LMS	9,904	23,681
5539 Halebank Non LMS	10,180	7,249
5544 Oakfield Primary Non LMS	4	781
5546 Moorfield Non LMS	(1)	974
5550 All Saints Upton Non LMS	12,402	14,681
5551 Fairfield Junior Non LMS	14,754	18,584
5553 Lunts Heath Non LMS	17,000	8,399
<b>Maintained Primary DFC Total</b>	<b>187,362</b>	<b>228,086</b>

## Secondary Schools

5595 The Bridge School PRU Non-LMS	<b>12,724</b>	<b>8,241</b>
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## Special Schools

5581 Ashley School Non LMS	7,454	2,965
5582 Chesnut Lodge Non LMS	2,416	14,276
<b>Maintained Special DFC Total</b>	<b>9,870</b>	<b>17,241</b>

<b>Grand Total</b>	<b>207,909</b>	<b>260,749</b>
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**REPORT TO:** Schools Forum

**DATE:** 13<sup>th</sup> July 2022

**REPORTING OFFICER:** Divisional Manager – Inclusion 0-25

**SUBJECT:** Delegated Top Up Funding (DTUF)

**WARDS:** Borough wide

### **1.0 PURPOSE OF THE REPORT**

To make proposals to Schools Forum regarding the reform of the use DTUF in order to support schools.

### **2.0 RECOMMENDATION: That**

- 2.1 DTUF Funding is moved into line with other provision and placement decisions through Halton's EHCP Partnership Panel (option A below).

### **3.0 SUPPORTING INFORMATION**

- 3.1 DTUF was set up as a means of providing schools with High Needs funding for children at risk of exclusion. It was later extended to include children with medical needs but no learning needs.
- 3.2 The intention was that the panel would consist of Heads, Deputy Heads and SENCOs. They were offered admin support and general advice and support from LA. LA admin receive the applications, send out paperwork to panel members, minute meetings, send out decision letters. LA Inclusion officers offer support with decision making and process any funding payments. Panel members/chair names were not shared with schools.
- 3.3 Over time, on reflection, panel members have not been able to prioritise attendance at panels. In order to progress, panels have increasingly relied on LA officers to arrange panel dates and respond to queries from schools. Since February 2021 attempts have been made to establish quorate DTUF panels at least half termly and due to non-attendance none of the panels has been able to progress as intended. Panel members do not all attend panels regularly. Schools making applications contact LA personnel to challenge decisions, complain etc.
- 3.4 In order to ensure that funding requests can be assessed the current practice in light of panels not sitting a number of options are now available:

3.5 **Option A:** is for DTUF applications to be heard as part of Halton's EHCP Partnership Panel. The Partnership panel is Halton's moderation and advisory panel regarding decisions to approve EHCP needs assessments; agreeing to issue draft EHCPs; and agreeing specialist placements. The panel is already a multi-agency panel, however, in light of the recent DfE Green Paper the Partnership Panel will need some school representation moving forward.

3.6 **Option B:** The originally intended system should be better supported. This would call for a new round of nominations to be sought from primary and secondary heads associations; for panel members to agree panel dates, send to admin staff for distribution to all schools.

- Panel chair should be responsible for monitoring attendance of panel members and recruiting new panel members when necessary.
- Panel membership/chair names to be shared with schools and all queries/challenges/complaints directed to the panel chair.
- Decision letters sent out by the chair should describe to schools appeal routes
- Halton LA to continue to process agreed payments and provide officer support on request of the chair.

#### **4.0 FINANCIAL IMPLICATIONS**

4.1 DTUF has been and will continue to be funded as part of DSG High Needs top-up funding. There is no additional budget requirement accompanying these proposed process changes.

#### **5.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES**

##### **5.1 Children & Young People in Halton**

It is essential that schools and education support services receive sufficient funding to allow them to support all children and young people.

##### **5.2 Employment, Learning & Skills in Halton**

None.

##### **5.3 A Healthy Halton**

None.

##### **5.4 A Safer Halton**

None.

##### **5.5 Halton's Urban Renewal**

None.

#### **6.0 RISK ANALYSIS**

6.1 It is evident that the major pressure on the High Needs Block are the costs of Out of Borough provision. Ensuring that schools have funding to

support early intervention is part of a broader strategy in reducing Halton's reliance on out of borough independent provision. The proportion of HNB used for DTUF will need to be regularly monitored to ensure that it is fairly and appropriately distributed.

**7.0 EQUALITY AND DIVERSITY ISSUES**

- 7.1 The Local Authority must discharge its statutory responsibilities in relation to all schools and settings.