

Public Document Pack



Schools Forum

Wednesday, 16 October 2024 4.00 p.m.
Civic Suite, Town Hall, Runcorn

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, 22 January 2025*

**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, 19 June 2024 held remotely

Present: Councillor T. McInerney, Observer
 A. Jones, Democratic Services, HBC
 N. Shafiq, Financial Management, HBC
 B. Holmes, Education, Inclusion and Provision
 C. Finch, SEND Policy, People, Performance & Efficiency
 C. Elechi, Financial Management, HBC
 J. Jardine, All Through School Representative
 K. Evans, Secondary Academy with a 6th Form Representative
 M. Tudor, Secondary Academy Representative
 J. O'Connor, PVI Representative
 J. Coughlan, Primary Representative - Infant School
 J. Wilson, (Vice Chair in the Chair) Secondary Governor Representative
 E. Haver, Special Academy Representative
 J. Thompson, Community Special Schools Representative
 C. Liku, Community Nursery Schools Representative
 J. Robertson, Small Primary School Representative
 R. Houghton, Community Primary Governor Representative
 B. Barton, 16-19 Provision Representative

Action

SCF1 APOLOGIES FOR ABSENCE

Apologies had been received from Karl Landrum – Primary School with a Nursery Representative; Nigel Hunt – PRU Representative; and Matty Deeney – Secondary Academy Representative.

SCF2 ELECTION OF THE CHAIR

Mr Karl Landrum stepped down as Chair of the Forum in May 2024. A replacement was canvassed for and Mr Nigel Hunt had volunteered and requested to be considered for the role. No other nominations were received.

The Forum voted unanimously to support Mr Hunt's nomination and he was elected as Chair with immediate effect, for an initial period of two years.

RESOLVED: That Nigel Hunt is elected as Chair of the Schools Forum from June 2024.

SCF3 MINUTES

The minutes of the meeting held on 21 February 2024

were agreed as a correct record.

Representatives the possibility of returning to face to face meetings, as the consensus was that these would be preferred going forward.

Officers would contact Education and Skills Funding Agency (ESFA) to check this was acceptable but it was thought that it was up to the Forum to decide how its meetings were conducted.

SCF4 MEMBERSHIP UPDATE

The Forum received an update on the Membership of the Forum, which explained recent recruitment activity for vacancies that existed.

Officers advised that two expressions of interest had now been received for the Primary Academy Representative, so one would be appointed before the end of term.

RESOLVED: That the update is noted.

SCF5 DSG OUTTURN 2023-24

The Forum received a report from the Director of Finance, which presented the Dedicated Schools Grant (DSG) final outturn for 2023-24.

It was reported that the final amount of DSG allocated to Halton for 2023-24 was £143,393,022, which was broken down as follows:

Schools Block	-	£106,745,453
CSSB	-	£737,941
Early Years Block	-	£9,774,577
High Needs Block	-	£26,135,051

The report gave details of the expenditure within each of the blocks and Representatives were referred to Appendix A, which gave a more detailed analysis of the 2023-24 final DSG outturn.

It was noted that overall, the DSG for 2023-24 had overspent by £2,455,961. Taking into consideration the carry forward deficit balance of £2,892,585 from the previous financial year, there is a total DSG deficit of £5,348,546 to be carried forward into 2024-25.

Additional information was provided following discussions:

- Nationally, the SEND deficit was now £1b and Halton had the 12th highest growth rate of EHCP's in the Country;
- The DBV (Delivering Better Values) Programme was introduced by the DfE to alleviate pressure on High Needs and Halton had been awarded £1m after bidding for funding;
- The DBV Programme had a positive response from schools and it was hoped that the projects within the Programme would support schools to continue to be more inclusive;
- The DBV funding was welcomed, however, the DfE was advised that £1m would not be enough to have an impact on the budget deficit and that a long-term plan would be needed;
- How the DBV money was being spent was closely monitored by the DfE and quarterly meetings were held with them. It was not thought that the funding would be withdrawn if not spent within a certain amount of time, but this would be checked;
- Schools had responded positively to the DBV Programme and there was a lot of interest; 19 had started DBV projects last week;
- An element of the DBV Programme included training schools' staff to deal with behavioural problems positively with the student. This was new territory for all and an attempt to do something different, in order to support schools who were struggling with the increasing numbers of SEND pupils. In relation to Out of Borough placements, it was predicted that these would eventually be reduced if the DBV Programme proved to be successful;
- Also, increased SEND provision in the Borough would begin to offset Out of Borough places naturally and it was reported that more schools were coming forward to offer more provision;
- Local authorities all over the country were struggling to fund High Needs and in Halton, it was felt that the DBV Programme alone would not solve the problem;
- One Representative gave an example of a resource base in one school that was under used and queried why – it was commented that some schools refused children with more complex needs, although information relating to this particular school was not at hand; and
- The under use of resource bases was a concern, as there was a risk of losing SEND places to other local

authorities, who were entitled to take places as their own Out of Borough provision.

RESOLVED: That Schools Forum note:

- 1) the overall deficit balance of DSG from 2023-24 of £5,348,546 is carried forward into the 2024-25 financial year; and
- 2) the continuing pressures resulting in an in-year overspend on the High Needs Block of £2,538,695.

SCF6 SCHOOLS BALANCES 2023-24

The Schools Forum considered a report from the Director of Finance, which gave the level of Revenue and Devolved Formula Capital (DFC) funding brought forward from 2023-24 by Halton's maintained schools.

It was noted that whilst balances were still required to be reported to the Schools Forum, no excess surplus balance limits were currently in place. Schools Forum however, retained the right to require schools to provide further information as to how their balance would be spent, should they so decide.

Appendix A showed the revenue balance for each maintained school, along with their 2022-23 balance for comparison. Overall, Halton's net surplus school budget balance position for maintained schools was £6,519,071, at the end of 2023-24. The report summarised comparisons with the previous year's balances.

Appendix B showed the Devolved Formula Capital (DFC) balances for each maintained school, along with their 2023-24 balance for comparison.

It was noted that 19 schools carried over a balance that was surplus to the Ofsted recommended thresholds (5% primary or 8% secondary). It was confirmed that the requirement to 'clawback' excess funds had been removed. If a school has an excessive surplus balance, the Forum can request information from the school on what the money would be used for. The reinstatement of the clawback policy would be explored and comparisons made with the use of this in other authorities. There were concerns that some schools had excess surplus balance carry overs year on year, so it was suggested that some clarity on those would be helpful.

Director of
Finance

RESOLVED: That the report is noted.

SCF7 HALTON SCHEME FOR FINANCING SCHOOLS UPDATE

The Forum was presented with the latest version of the Halton Scheme for Financing Schools (SFFS), applicable to maintained schools only, as updated for 2024.

Director of
Finance

It was noted that there were no directed revisions issued by the DfE since Schools' Forum last approved the Scheme for Financing Schools for 2021.

The updates described in paragraphs 3.3 and 3.4 were noted.

RESOLVED: That Schools Forum

- 1) note any updates approved; and
- 2) agree to the latest version being made available, as statutorily required, to all maintained schools and on a website accessible for public inspections.

Meeting ended at 4.50 p.m.

REPORT TO:	Schools' Forum
DATE:	16 th October 2024
REPORTING OFFICER:	Operational Director – Finance
PORTFOLIO:	Children & Young People
SUBJECT:	DSG Forecast Outturn for 2024-25
WARD(S)	Borough wide

1.0 PURPOSE OF THE REPORT

1.1 To report the Dedicated Schools Grant forecast outturn for 2024-25.

2.0 RECOMMENDATION: That

2.1 The report is noted.

3.0 SUPPORTING INFORMATION

3.1 Grant settlement

The Dedicated Schools Grant allocation for 2024-25 is £154,359,370 broken down as follows:

Schools Block	£111,188,230
CSSB	£746,822
Early Years Block	£15,327,108
High Needs Block	£27,097,210

Of this, £58,637.34 is recouped from the Schools Block and an estimated £3,305,167 recouped from the High Needs Block for academies and further education. These figures are based on latest July DSG settlement update provided by the DfE.

3.2 Schools Block

There was no block transfer in current years against the High Needs Block meaning the balance of £111,188,230 was fully devolved to mainstream primary and secondary schools and academies through the funding formula.

We are mirroring the National Funding Formula (NFF) factors and criteria as well as the NFF cash values for all formula components.

3.3 Central Schools Services Block (CSSB)

The CSSB of £746,822 is currently forecast to budget in respect to the central services supported by this block.

3.4 Early Years Block

The Early Years Block of £15,327,108 is currently forecast to budget and is subject to future variation based on termly headcount data.

In addition, the DfE have recently announced additional funding for 2024-25 namely the Early Years Budget Grant (EYBG). This will provide all Halton’s Early Years providers a 0.0034% rate uplift for 3 and 4 year old funding resulting in an increase of £0.02 and an approximately 10.7% uplift to the Maintained Nursery hourly rate resulting in an increase of about £0.50 to support increases to teachers pay from September.

This funding is restricted to 3 & 4 year old unlike prior year Early Years Supplementary Grant whereby the funding rates increase was extended to 2YO, EYPP, and DAF. The EYBG would be paid from September 2024 to March 2025 and overall funding estimates will be known based on autumn adjustments.

3.5 High Needs Block

The High Needs block allocation of £27,097,210 is reduced by FE recoupment of £3,305,167 and the balance of £23,792,043 is insufficient to meet the total estimated expenditure required for 2024-25.

The recurring areas of pressure are as a result of increasing volumes of children referred for Education Health and Care Plans (EHCPs) and associated costs.

We are currently facing an in-year deficit of £2,532,825 within the High Needs Block. The areas that are overspending are:

	Budget	Forecast	Variance
Top-up funding	£10,455,348	£11,242,605	787,257
INMSS	£6,363,210	£8,108,778	1,745,568
Inter Authority	£603,990	£685,239	£81,249

3.6 DSG Balances

Taking into account the deficit brought forward from 2023-24 of £5,348,546 and anticipating the ongoing pressures specifically faced by the High Needs Block forecasting an in-year deficit of £2,532,825, the cumulative forecast deficit by the end of 2024-25 is £7,881,371.

The accumulating deficit has resulted in Halton being included in tranche 3 of the DfE intervention ‘Delivering Better Value (DBV) in High Needs where work is currently in progress to develop a realistic and robust recovery plan that will require the approval of the DfE.

3.7 Core Schools Budget Grant

In July 2024, the government announced that an additional almost £1.1 billion would be provided in the 2024 to 2025 financial year for

mainstream schools, high needs settings, and local authorities with centrally employed teachers through the CSBG.

In the 2024 to 2025 financial year, mainstream schools will be allocated their portion of this additional funding through the 2024 to 2025 CSBG. This is in addition to schools' allocations through the schools national funding formula.

Funding for this grant will be allocated to the authority maintained and academies to cover the 2024-25 financial year from September to March to support the teacher pay award.

There is a calculator tool available for schools/authority to estimate their funding amount which is based on funding factors such as pupil numbers from Oct 2023 census and FMS 6 and a lump sum amount and uplifted by Halton Area Cost Adjustment (ACA).

The table below shows the funding rates for all the factors.

	Basic Per-Pupil for Primary Pupils	Basic Per-Pupil for KS3 Pupils	Basic Per-Pupil for KS4 Pupils	FSM 6 Per-Pupil for Primary Pupils	FSM 6 Per-Pupil for Secondary Pupils	Lump Sum	ACA
Funding Rates	£76	£108	£122	£70	£100	£2,900	1.00

Overall the estimated additional funding for Halton Schools using the 2024-25 APT pupil numbers is estimated at £2.4m

3.8 2025-26 Schools Funding Arrangements

We received an email from DfE on Thursday 3 October to confirm details of Schools funding arrangements for 2025-26, stating that the notional schools and high needs national funding formula (NFF) allocations for 2024-25 has been delayed due to the timing of the 2024 general election.

There are plans to publish notional NFF allocations for schools and operational guide and NFF technical note as soon as possible following the budget announcement on 30 October 2024 and the dedicated schools grant(DSG) allocations will be published in December 2024.

4.0 FINANCIAL IMPLICATIONS

4.1 Further savings and reducing overspends are essential to getting back to a balanced DSG position.

5.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

5.1 **Improving Health, Promoting Wellbeing and supporting Greater Independence**
None.

5.2 Building a Strong, Sustainable Local Economy

None.

5.3 Supporting Childre, Young People and Families

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

5.4 Tackling Inequality and Helping Those Who Are Most In Need

None.

5.5 Working Towards a Greener Future

None.

5.6 Valuing and Appreciating Halton and Our Community

None.

6.0 RISK ANALYSIS

6.1 Continued overspending against DSG will impede plans to change and improve services and provision.

7.0 EQUALITY AND DIVERSITY ISSUES

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

REPORT TO:	Schools' Forum
DATE:	16 th October 2024
REPORTING OFFICER:	Operational Director – Finance
PORTFOLIO:	Children & Young People
SUBJECT:	Excess School Balances
WARD(S)	Borough wide

1.0 PURPOSE OF THE REPORT

- 1.1 To discuss possible actions required for Maintained Schools excess balances reported in June 2024.

2.0 RECOMMENDATION:

- 2.1 To discuss and seek approval of the Schools' Forum to adopt the proposed Halton Borough Council School Balances and Clawback Guidance 2024/25 - **Appendix C**.

3.0 SUPPORTING INFORMATION

- 3.1 While school balances are still required to be reported to the Schools' Forum, no excess surplus balance limits are currently 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 In accordance with statutory requirements, including the Schools Financial Value Standard (SFVS), schools are expected to sustain 'reasonable' levels of surplus balances and demonstrate 'Value for Money' through effective plans for spending their budgets.
- 3.3 Despite the excess surplus thresholds no longer being a mandatory consideration to the Controls on Surplus Balances provision, the original maximum recommended thresholds are still commonly referred to, including by Ofsted, at 5% for Secondary and 8% for Nursery, Primary, and Special schools.
- 3.4 **Appendix A** shows the Revenue balances for each Maintained school, along with their 2022-23 balance for comparison.
- 3.5 The overall net surplus School Budget balances position for Halton maintained schools at the end of 2023-24 is **£6,519,071**.

- 3.6 Out of 46 Maintained schools, there are 40 (87%) with Surplus balances and 6 (13%) with a Deficit position at the end of 2023-24.
- 3.7 Of the 40 with surplus balances, 19 (representing 48% of all Maintained schools) have accumulated surplus balances above the original maximum thresholds of 5% and 8%.
- 3.8 When compared to 2022-23 there are 21 (46%) Maintained schools that have increased their Surplus balance, and 25 (54%) that have decreased their balance from the previous financial year.
- 3.10 **Appendix B:** The proposed clawback options is to allow School Forum to make a decision on the three available options:
- 3.11 Option 1
Do nothing, and use the details as information and allow Schools to retain their balances.
- 3.12 Option 2
To have a formal clawback policy in place where HBC target schools with a 12.5% balance & apply a £100,000 minimum balance threshold.
- 3.12 Option 3
Instead of implementing option 2, HBC can request schools to justify the excess balances with information on planned use of their school balances.

4.0 FINANCIAL IMPLICATIONS

- 4.1 It is pleasing to note that, despite the many costs pressures being faced by schools, the overall school balances have been sustained at over £6.5m.
- 4.2 The increased Devolved Formula Capital balance, from the additional funding referred to above, will greatly assist schools in developing and installing energy efficiency measures which should help them sustain longer-term cost efficiencies and financial benefits to their Revenue budget positions.

5.0 IMPLICATIONS FOR THE COUNCIL'S PRIORITIES

- 5.1 **Improving Health, Promoting Wellbeing and Supporting Greater Independence**
None.
- 5.2 **Building a Strong, Sustainable Local Economy**
None.

5.3 Supporting Children, Young People and Families

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

5.4 Tackling Inequality and Helping Those Who Are Most In Need

None.

5.5 Working Towards a Greener Future

None.

5.6 Valuing and Appreciating Halton and Our Community

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 Schools Final Outturn Balances 2023-24

Costc	School	Balance	% Balance
		2023-24	
5001	Ditton Nursery School	-48,491	-17.94%
5002	Birchfield Nursery School	53,792	9.84%
5003	Warrington Road Nursery School	-8,190	-1.64%
Total Nursery Schools		-2,888	

APPENDIX A

2022/23 Balance	Variance to 2023/24	% Variance to 2023/24
-44,219	-4,272	9.66%
3,842	49,950	1300.10%
26,074	-34,264	-131.41%
-14,303	11,415	-79.81%

Primary Schools

5100	St Mary's CE Primary	419,883	25.36%
5101	St Edwards Catholic Primary	35,557	3.81%
5105	Victoria Road Primary School	41,968	2.86%
5106	Weston Primary School	-7,416	-0.60%
5107	St Clements Catholic Primary School	153,829	12.22%
5108	Westfield Primary School	39,936	4.47%
5110	Castle View Primary School	56,203	4.21%
5111	Astmoor Primary School	8,608	0.81%
5112	The Brow Community Primary	288,109	16.06%
5113	Woodside Primary School	-29,213	-2.48%
5114	The Holy Spirit Catholic Primary	7,454	0.79%
5116	Pewithall Primary School	46,640	3.65%
5118	Hallwood Park Primary School	16,002	1.78%
5120	Runcorn All Saints Ce Primary	155,356	14.38%
5121	Our Lady Mother of the Saviour Catholic Primary	214,125	13.92%
5122	Hillview Primary School	104,992	8.93%
5123	Beechwood Primary School	65,173	5.41%
5125	Brookvale Primary School	246,247	11.53%
5126	St Martins Cath Primary School	-42,087	-3.10%
5127	Murdishaw West Comm Primary School	69,672	5.87%
5128	Gorsewood Primary School	436,386	23.88%
5129	St Berteline's CE Primary	73,830	4.53%

420,005	-122.07	-0.03%
74,305	-38,748	-52.15%
140,232	-98,264	-70.07%
35,352	-42,768	-120.98%
65,741	88,088	133.99%
-4,737	44,673	-943.07%
104,322	-48,119	-46.13%
44,639	-36,031	-80.72%
248,588	39,521	15.90%
64,144	-93,357	-145.54%
3,750	3,704	98.76%
20,238	26,402	130.46%
60,810	-44,808	-73.69%
107,113	48,243	45.04%
221,114	-6,989	-3.16%
108,059	-3,067	-2.84%
55,637	9,536	17.14%
417,762	-171,515	-41.06%
-42,536	449	-1.06%
107,207	-37,535	-35.01%
403,440	32,946	8.17%
46,739	27,091	57.96%

Costc	School	Balance	% Balance	2022/23 Balance	Variance to 2023/24	% Variance to 2023/24
		2023-24				
5130	Windmill Hill Primary School	76,053	5.18%	223,033	-146,980	-65.90%
5132	Moore Primary School	174,452	13.71%	168,327	6,125	3.64%
5133	Hale CE Vol Contr Primary	15,965	1.38%	32,766	-16,801	-51.27%
5134	St Bedes Catholic Junior School	202,760	10.36%	215,492	-12,732	-5.91%
5135	St Bedes Catholic Infant School	81,333	5.65%	80,069	1,264	1.58%
5137	St Michael's Catholic Primary School	65,626	3.71%	89,712	-24,086	-26.85%
5138	Farnworth CE Controlled Primary	162,093	6.81%	207,455	-45,362	-21.87%
5139	Halebank CE Voluntary Controlled Primary	75,102	7.94%	120,529	-45,427	-37.69%
5140	St Gerard's Catholic Primary & Nursery	310,199	16.60%	342,028	-31,829	-9.31%
5144	Oakfield Primary School	412,929	14.73%	299,700	113,229	37.78%
5146	Moorfield Primary School	45,227	2.90%	37,194	8,033	21.60%
5148	Our Lady Of Perpetual Succour Primary	171,998	12.34%	110,992	61,006	54.96%
5149	St Basils Catholic Primary	217,047	10.01%	378,029	-160,982	-42.58%
5150	All Saints Upton CE Voluntary Controlled Primary	73,693	4.90%	83,239	-9,546	-11.47%
5151	Fairfield Primary	236,717	6.08%	231,645	5,072	2.19%
5153	Lunts Heath Primary School	173,091	7.30%	274,856	-101,765	-37.02%
5154	St John Fisher Catholic Primary	121,158	8.63%	77,948	43,210	55.43%
Total Primary Schools		5,016,698		5,674,938	-658,240	-10.10%

Secondary Schools

5312	St Peter & Paul Catholic High	585,841	5.68%	532,342	53,499	10.05%
5313	The Bridge School PRU	-63,115	0.00%	-41,441	-21,674	52.30%
5315	The Bridge - Astmoor Skill Centre			490,901	31,824	65.40%
Total Secondary Schools		522,725		490,901	31,824	65.40%

Special Schools

5401	Ashley School	566,894	18.40%	526,438	40,456	7.68%
5402	Chesnut Lodge Special School	415,642	14.75%	366,802	48,840	13.32%
Total Special Schools		982,536		893,240	89,296	63.00%

TOTAL ALL SCHOOLS	6,519,071	8.14%
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7,044,776	-525,705	-7.46%
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Surplus Balance	40	87%
<i>of which Surplus is above Ofsted recommended thresholds of 5% or 8%</i>	19	48%
Deficit Balance	6	13%

Increased	21	46%
Decreased	25	54%
Total	46	

2023-24 Clawback Calculation				APPENDIX B		
Primary Schools				Threshold	£100,000	
Costc	School	Balance	% Balance	12.5%	Exces Balance	Clawback
5100	St Mary's CE Primary	£419,882.93	25.36%	12.86%	£319,882.93	£159,941.47
5112	The Brow Community Primary	£288,109.03	16.06%	3.56%	£188,109.03	£94,054.52
5120	Runcorn All Saints Ce Primary	£155,355.91	14.38%	1.88%	£55,355.91	£27,677.96
5121	Our Lady Mother of the Saviour Catholic Primary	£214,124.82	13.92%	1.42%	£114,124.82	£57,062.41
5128	Gorsewood Primary School	£436,386.46	23.88%	11.38%	£336,386.46	£168,193.23
5132	Moore Primary School	£174,451.86	13.71%	1.21%	£74,451.86	£37,225.93
5140	St Gerard's Catholic Primary & Nursery	£310,199.04	16.60%	4.10%	£210,199.04	£105,099.52
5144	Oakfield Primary School	£412,928.84	14.73%	2.23%	£312,928.84	£156,464.42
	Total Primary	£2,411,438.89			1,611,438.89	805,719.45
Secondary Schools						Clawback
5312	St Peter & Paul Catholic High	585,841	5.68%		£485,840.64	£242,920.32
	Total	£2,997,279.53			£2,097,279.53	£1,048,639.77

APPENDIX C

School Balances and Clawback Guidance 2024/25

This guidance applies to school balances at 31 March 2025

Threshold Balances

The Authority's current maximum threshold balance is:

- 12.5% of Consistent Financial reporting (CFR) income for all phases of maintained Primary and Secondary school respectively
- A £100,000 minimum balance threshold will be applied.
. This will provide smaller schools with a larger level of allowable balance as a protection against future costs pressures).

Clawback of "excess balances"

The Authority's clawback arrangements are:

- A clawback rate of 50% is to be applied to any balance above the threshold in the first year a school exceeds the threshold (after adjusting for exemptions).
- A clawback rate of 100% is to be applied to any balance in excess of threshold where the threshold has been breached for two or more consecutive years (after adjusting for exemptions).

Exemptions from clawback

The Authority shall make the following deductions from the school's actual balance before applying clawback:

- Funds accumulated by schools where there is a contractual agreement, as part of a grant allocation or dual use agreement, for facilities to be replaced on a fixed basis (i.e. an all-weather pitch) will continue to be exempt from clawback. Conditions of this exclusion are:
 - The amount excluded cannot exceed the total cost of replacing the facility committed in the contract/agreement.
 - The exclusion will only be allowed for a period equivalent to the stated replacement timetable for the facility and will be subject to retrospective clawback if no replacement is funded or if the replacement is at a lower value than estimated.

- o Schools will be required to submit relevant supporting documentation relating to the terms of the contract or grant, including evidence of replacement conditions, and also estimated costs.
 - o Requests for exemptions should be considered by the Forum. Requests are to be submitted before 31st October to be considered in the Autumn Term by 31st December, for balances at 31st March.
 - o Evidence for an exemption must be in line with the policy and submitted in full to schoolsforum@halton.gov.uk no later than two weeks before the scheduled Working Group for the Forum to consider the request.
- Any funding received in advance that is funded on an academic year basis to schools by the DfE or other Government department will have 5/12 this exempt from clawback. Schools will be required to submit relevant supporting documentation relating to the government allocation, including appropriate evidence of distribution timescales.
 - Funding allocations that are notified to schools late in the financial year, where schools could not reasonably have considered the allocation in their financial planning for the year. Late allocations are defined as allocations notified to schools after 1st January each financial year. Allocations that are notified to schools before the 1st January of the financial year, but where the funding is received at a later date, would not qualify under this exemption.
 - Devolved Formula Capital (DFC) allocations are specifically excluded from the clawback calculation. Schools are asked to ensure that the relevant capital accounting codes are used for DFC income and expenditure, to guarantee that this funding is identifiable and able to be excluded from year end revenue balances and the clawback calculation.
 - Funding allocations received under S106 of the Town and Country Planning Act 1990. This is developer contributions towards the costs of providing community and social infrastructure, the need for which has arisen as a result of a new development taking place.
 - No further clawback exemptions will be allowed.

What is Consistent Financial Reporting (CFR) Income?

CFR Income is defined by the Department for Education in the consistent financial reporting (CFR) framework.

<https://www.gov.uk/guidance/consistent-financial-reporting-framework-cfr>

You will have seen your CFR income on several documents, but you may not have known it by this description.

You will have seen it on:

- Your financial outturn statement - it is the total line labelled "Revenue Income". This will be the sum of lines 101 to 1180 on the outturn statement:
 - o This is the figure that will be used to calculate the guideline but as funding and income will change during the year this figure will not be known until the outturn statements have been produced following the end of the financial year.
 - o It does not include "Capital Income" codes CI01-CI04

- On your submitted income and expenditure form - it is the total line labelled "Total Income Revenue". It does not include any balances brought forward.
 - o This is not used to calculate the guideline, but it is your estimate of your CFR income and may be used as your estimate of the guideline. Please note if you revise your estimates of income in the year then you would need to revise your estimate of the guideline figure.

REPORT TO: Schools Forum

DATE: 16th October 2024

REPORTING OFFICER: Acting Director of Education

SUBJECT: Speech and Language Service Update

1.0 PURPOSE OF THE REPORT

- 1.1 To provide an update of the current position of the Speech and Language service by Communicate - SLT CIC the commissioned service for Halton Council and NHS Cheshire and Merseyside.
- 1.2 To provide an update on current plans and next steps to support increase in demand for Speech and Language provision.

2.0 BACKGROUND

- 2.1 A tender process took place last year for the children and young people's Speech and Language Therapy contract. The contract was awarded to a new provider, Communicate-SLT CIC. The service is jointly commissioned with NHS Cheshire and Merseyside, with HBC holding the contract.
- 2.2 HBC and ICB commissioners agreed that the service should prioritise key areas of provision based upon the clinical risk to children and young people and statutory responsibilities. These comprise of:
 - Children and young people requiring an assessment or review during the EHCP (Education, Health and Care Plan) process
 - Children and young people on the neurodevelopmental pathway.
 - Children and young people with dysphasia (swallowing difficulties).

3.0 CHALLENGES

- 3.1 Demand for speech and language service has exceeded capacity. This is largely due to four key areas. These include:
 1. Staffing Communicate set out that the service requires 12fte SLTs. Of the 7.8fte speech and language therapists eligible for TUPE at the beginning of the contract only 3 transferred, all of these left early in 2024. The service advertised for SLTs from the commencement of their contract, but has been unable to successfully recruit. The difficulty recruiting is reflected nationally. The Royal College of Speech and Language Therapists (2022) stated there is a 25% vacancy rate of paediatric speech and language therapists (SLTs). As of

September 2024 Communicate SLT is fully staffed and is 0.4fte SLT less than was set out at the beginning of the contract.

2. Inherited waiting lists from the previous provider as well as the increase from 147 to as of September to 735 on the ASD waiting list.
3. Data transfer from the previous provider. A point of transfer the data was 4925 young people of which 2752 we believed to have been discharged leaving 2173 active cases. Communicate have now completed the relevant admin exercise to remove all 2,467 discharged cases.
4. Understanding the caseload. The quality of data that was transferred from the previous provide was limited and not was readily easy to abstract information from to give a clear picture of caseloads as well as the required information for each child, school address etc. Work around the caseload has been completed by Communicate.

3.2 The impact has been an increase in some service waiting times and a number of informal and formal complaints relating to the waiting times for assessments and interventions. The service was requested to prioritise children and young people with the highest clinical need, the impact has therefore been higher for some elements of the service than others.

4.0 CURRENT PLANS TO SUPPORT INCREASED DEMAND

4.1 HBC are working with Communicate and other partners to update the current speech and language pathway during the autumn term. The redevise pathway will be placed within the Local Offer as part of the family hub digital platform to make it easier and more accessible for parents and carers. It will give them information around communication for children at different ages, resources etc. We are also working to include automated pathways that will push out messages to parents and carers that agree information to support them, when and how to seek help, advice, toolkits etc.

4.2 For children with EHCP there are two initial elements:

1. For an extra 7 months starting in September there will be some additional consultant capacity from Communicate that will increase the volume of EHCP completed.
2. Following conversations with senior leaders and Communicate it has been agreed that Communicates activity will be aligned to what was agreed at point of tender. They will focus on the agreed priority areas but for EHCP activity this will be within the Halton Special Schools and SLCN Resource bases initially for quarter three. This also includes some capacity that

Communicate to response to clinical high risk cases in addition to agreed work with schools.

4.3

For children on the ASD pathway there are two initial elements:

- For an extra 7 months starting in September there will be some additional consultant capacity from Communicate.
- ICB are finalising details for an agreement with Bridgewater which will see 1.6fte STL's work to support the backlog of ASD assessments.

5.0 NEXT STEPS

5.1 Commissioners will continue to work closely with Communicate as the provider to measure the output of activity across each pathway to ensure they deliver against agreed targets.

5.2 HBC are undertaking a scoping exercise across other qualified Speech and Language providers to support young people with EHCP's. The initial brief is for providers to work with schools and settings including out of borough schools where Halton young people are placed in a cluster arrangement to review EHCP's where it is identified that SLCN is a primary or secondary need.

A presentation will be given at the forum to go through more detail around this approach and the implications for HNB.



Report Prepared for the DfE for Quarter 2 – July-Oct 24

Submitted to DfE on 26th September 2024

Author Mike Stapleton-Chambers BSC (Joint Hons) NPQH RAF (retd)

Senior School Quality Assurance Officer

DBV SEND Programme Lead

Provide a summary of progress to date in relation to the agreed implementation plan

- July 24 Reflection of uptake meeting with Thrive. Plan to ensure schools not yet taken the offer take it in the Autumn term
- July 24 join planning meeting with NASEN and Thrive to ensure SEND Conference is aligned with the training being rolled out
- July 24 Meeting with Dingley’s Promise who will offer additional free training offer for childminders and nursery practitioners across Halton until the end of September. This offer has training that can be accessed online that links to the areas of need we have identified.
- Aug 24 -New Panel in place to review EBNS cases – will sit half termly
- Aug 24 – EP team agreed to becoming Team Teach Trainers – *this will allow sustainable model for after DBV has finished*
- Aug 24 – Educational Psychiatrists (EP) worked with Thrive to ensure consistent approach
- Aug 23 – Thrive Approach meeting regarding roll out capacity and impact. Also dashboard created to measure impact
- Sept 24 – Educational Psychiatrists (EP) trained as Thrive both Lead Childhood & Adolescence Trainers
- Sept 24 – Educational Psychiatrists (EP) trained as Team Teach Trainers
- Sept 24 – DBV Lead, Data Analyst and Kevin Burns (Consultant) challenge meeting around data sets
- Sept 24 – DBV meeting with local GP and Health workers around EHCP suggests – letters sent to professional and schools to ensure joint approaches
- Sept 24 – Dates set for TATS – Team around the school approach to support senior leaderships with behavioural approaches.
- Sept 24 - HT coaching and influence meetings dates set for Headteachers
- Sept 24 – ‘Learning Lunch’ event for Resource Bases

Grant expenditure summary

Appointment of Data Analyst

Projected cost Q2 £ 15k	Actual Cost Q2 £9240	Spend to date £18,480
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Program DBV Lead

Projected cost £ 35k	Actual Cost £ 23,750k	Spend to Date £28,750k
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Temp Inclusion manager

Projected Cost £15k	Actual Cost £2k	Spend to date £4k
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Nasen Halton Conference Nov 24 - £7650

Room Hire - £300

We are also committed to the salaries of the Data Analyst and Program Lead for DBV. We are still on track to be on track for total spend for the whole project.

Q1 cost £326,240

Q2 cost £42,940

Total Cost to date: £369,180

Workstream: Behaviour Support Change Programme

Workstream summary

An overview of progress, including risks, mitigations or significant successes

Milestones Quarter 2

WS 1- Behaviour Support- Thrive – Ahead (implementation phase)

WS 1- Behaviour Support - Team teach – Ahead (implementation phase)

WS 1- Behaviour Support Lead Practitioner – On Track (implementation phase)

WS 1- Behaviour Support EBSNA Pathway – On Track (implementation phase)

WS 1- Behaviour Support HD Unit – On Track (co-design phase)

Governance for the DBV Grant sat with the Health Policy & Performance Board (PPB) and also our Leadership Board up until 12th September 2024. From this date DBV has been reported at the SEND Improvement Board. This now ensures appropriate oversight, challenge and support that is more clearly aligned to our SEND Improvement Strategy.

Evidence and progress

Summarise key milestones that have been achieved in this quarter within the workstream. Include any relevant attachment in section 3

WS 1- Behaviour Support- Thrive – Ahead (implementation phase)

In summary to date 72.8% of schools have engaged regarding the project with 57.1% of schools having booked some or all of their Thrive training. The first induction trainings for Halton staff have now been delivered with 474 staff registrations. In addition we have also now brought on board the Educational Psychologist team who have purchased Thrive training and will be joining some of the Halton practitioner trainings so that they can support schools through their work. This is in addition to us also training both our EYFS Team and also our Specialist Teaching Team members. This Halton Officers training will ensure sustainability after DBV ceases.

WS 1- Behaviour Support - Team teach – Ahead (implementation phase)

We are currently ahead in our roll out of Team Teach. All our Resource Bases have now been trained as well as a number of mainstream settings- 74 members of school staff have had Level 1 training and 10 Level 2. We also have more settings booked in before Christmas. We have now taken the decision to train 8 of our EP team (Educational Psychologist). This will give us the opportunity to be sustainable after DBV has finished. We had previously planned to give the trainers training to schools (via expression of interest previously). We also feel we will be able to suggest and deliver bespoke training for settings if the need arises from this change in approach. We have also secured a workshop for up to 50 places for November from Team Teach- this course is nearly full. This is designed to support schools who have only a few members of staff that need training.

Training Feedback from H/T Murdishaw Primary School:

*Just wanted to let you know that we have had ***** from Victoria Road in training our staff the last 2 Wednesday nights with some de-escalation techniques, and her delivery, compassion to our staff and subject knowledge was outstanding! Thank you for making this training free to us. Very worthwhile and would recommend to all.*

WS 1- Behaviour Support Lead Practitioner – On Track (implementation phase)

Team around the School Model (TATS) now in place. This is in the form of a weekly professional meeting in which pupils at risk of exclusion are identified both by settings and other Halton LA data sets. The meeting is made up of EP, EWO, Specialist Teachers, Mental Health, Nursing, Locality

Teams as well as Police, Youth Justice and Social Worker if applicable to the child. The newly appointed data analyst team members use the data to drive the meetings held.

WS 1-Behaviour Support EBSNA Pathway – On Track (co-design phase)

EWO and EP Services are now engaged to work with EBSNA children and families. This is a joint approach from both SASOs (School Attendance Support Officers) and Assistant EPs. These children will be identified by a S19 or Education Inclusion Panel to consider school referrals. This panel and governance has been agreed. With our data analyst now in post we are using the Vulnerable Learners groups (meets 6 weekly) to identify and monitor this cohort and report impact.

WS 1- Behaviour Support HD Unit – On Track (co-design phase)

Proposal shared with Secondary headteachers, via Headteacher briefings and 1-1 meetings. Model and costings codesigned with schools and expressions of interest invited and received we are collating this feedback but the general response was positive. One secondary setting has been identified and planning meeting have been set to commence in October. In line with our agreed plans we are still aiming for late Autumn term implementation.

Measuring impact

You should outline if there has been any emerging impact from the workstream, aligned with your implementation plan. Key measures may include outcomes. Examples include attendance and attainment, EHCNA/EHCP data, timeliness and provision mix, High Needs spend, qualitative insights from children, young people, families and carers

Short term indicators

- School/setting uptake of training offer

Thrive Approach

- To date 72.8% of schools have actively engaged in communications and have booked or are in process of booking training.
- 474 staff registrations for training
- 3 schools have indicated that they would like to delay / not engage in training offered at this time. These schools will be revisited in the next quarter.

% OVERALL Absence	Formal Full-Year DfE Data Releases					Last formal DfE data		Current Position	
	2018	2019	2021	2022	2023	Rate	When	Rate	When
EHCP	8.5	8.6	19.0	12.6	11.6	13.1	Spr 24	9.7	21/09/2024
EHCP & FSM	-	-	-	-	-	15.8	Spr 24	11.9	21/09/2024
EHCP & EAL	-	-	-	-	-	7.2	Spr 24	-	21/09/2024
SEN Support	6.9	7.2	7.3	9.8	9.8	10.2	Spr 24	8.1	21/09/2024
SEN Support & FSM	-	-	-	-	-	12.5	Spr 24	9.5	21/09/2024
SEN Support & EAL	-	-	-	-	-	6.1	Spr 24	-	21/09/2024

The above figures show a slight impact already on attendance.

Team Teach

- To date we trained all resource bases (14 in total), 8 mainstream setting are undertaking or booked for training before Dec 24.
- 74 staff trained at Level 1
- 10 staff trained at Level 2
- We now have 10 trainers in Halton – 8 EP’s and 2 Trainers from our Resource Bases

Program Lead appointment and Data Analyst

- Both have been both now in post training completed.

- Data Analyst is tracking and building dashboard for regular impact of the DBV grant is this also linked to wider SEND strategic overview
- Inclusion Manager in post secondment from existing SEND Assessment Team this is to allow further capacity for the program.

Top Level Measures

The number of new plan in 2024 was 270, a 25.5% increase when compared to the year before that.

Request for Statutory Assessment:	2023- 383	2024- 409
Placement into Maintained Mainstream Schools (MMS):	2023 - 35.0%,	2024 - 41.9 %
Placement into Maintain Special Schools (MSS) :	2023 - 44.7 %,	2024 -37.2%
Placement in non-maintained independent special school (NMISS):	2023- 8.2%	2024:8.0%

latest NMISS Data below

As of 024/09/2024:-	
No Schools Commissioned	35
No of CYP Placed	126
Average Placement Cost	£63,765.00
Open Searches (as of 24/09/2024)	20

Exclusions (annual 2022-23) 41 (23-24 Autumn& Spring) 27

Suspensions (annual 2022-23) 1857 (23-24 Autumn& Spring) 1721

Electively Home Educated EHCP as of Sept 24 8

SEND transport Spend (Sept 2024) IN borough 427 pupils £1,698,456
£3,977.65 (average)

OOB 109 pupils £1,204,178
£11,047.50 (average)

Total SEND Transport SPEND (Sept 2024)

No. Pupils	536	Spend	£2,902,634
		Average	£5,415.36

Report on the Current Position of Halton Borough Council As of 19th September 2024 for CYPs with EHCPs

1. Percentage 20 Weeks Timeliness

- 64% of new plans completed within 20 weeks excluding exceptions. This was an improvement over last year position of 26.3% and the national level of 50.7%.
- 62.4 % of new plans completed within 20 weeks including exceptions. This was an improvement over last year position of 29.0% and the national level of 49.1%.

2. Percentage Assessment Agreed to Issue EHCP: 92.6% of assessments were agreed to issue a plan. This is 1% lower than Halton’s last position of 93.6% but higher that national level of 91.2%.

3. Percentage of CYP in Non-maintained independent schools (NMISS): 7.20% of CYP with EHCPs were in NMISS, a lower percentage when compared to Halton formal position of 8.0% but a higher percentage than the national level of 5.2%.

4. Attendance : The overall absence for CYPs with EHCPs for 2023/24 academic year was 13%, the same as 2022/23 academic year. Comparing that to the national's, this cohort of CYPs had a lower overall absence rate of 1% than the national of 14.0%. No impact observed in this area yet.

5. Suspensions: The suspension rate for CYPs with EHCPs for the year 2023/24 was 7.35%, an improvement over the 2022/23 rate of 12.07%. However, this improvement was experienced nationally as the 2023/24 national rate was 7.93, a better rate than the 2022/23 national rate of 15.72%. Although, Halton last academic year was better than the previous year and the national rate, it is difficult to tell whether the current interventions impacted the rate because the improvement was experienced nationally.

6. Permanent Exclusion: The permanent exclusion rate for CYPs with EHCPs for the year 2023/24 was 0.06%, an improvement over the 2022/23 rate of 0.13%. However, this improvement was experienced nationally as the 2023/24 national rate was 0.07%, a better rate than the 2022/23 national rate of 0.11%. Although, the rate of permanent exclusion among this cohort of pupils in Halton in 2023/24 was better than that of 2022/23 and the national rate, it is difficult to tell whether the current interventions impacted the outcome because the improvement was experienced nationally.

Has there been any slippage in delivery plans?

No, pace has now increase due to the appointments of staff since last quarter.

Overall progress on total opportunities including, implementation plan and DSG management plan

DSG plan will continue to be maintained. The latest updated version will be available to share from Jan 2025

Workstream 2: Inclusion Programme

Workstream summary

An overview of progress, including risks, mitigations or significant successes

WS 2- Inclusion Quality Mark – On track (implementation phase)

WS 2- Inclusion Toolkit/ SA Framework – On track (implementation phase)

WS 2- Inclusion Lead Practitioner – On Track (implementation phase)

WS 2- Headteacher Coach and Influence Model – On Track (co-design phase)

Evidence and progress

Summarise key milestones that have been achieved in this quarter within the workstream. Include any relevant attachment in section 3

Roll out of WS 2 has been deliberately delayed, and WS1 prioritized in quarter 1. This followed liaison with stakeholders, predominantly schools who recognise that they need careful roll out of project to allow full engagement. We have now moved on at pace to ensure the time is made up to ensure implementation, but at the same time are sensitive to the needs of our stakeholders.

WS 2- Inclusion Quality Mark – slightly behind (implementation phase)

After consultation with stakeholders we have moved away from design and create a Halton Quality Mark. It was understood from speaking to schools that they would rather have a nationally recognised mark. This will now be in the form of the IQM (Inclusion Quality Mark), the launch took place in September at our DBV ‘Learning Lunch’ for Resource base settings Once the Resource Bases are on board we will look at phase two. This will involve these schools supporting and offering outreach to mainstream in the form of inclusion which over time will form the creation of the Halton Quality Mark.

WS 2- Inclusion Toolkit/ SA Framework – On track (implementation)

This links to Workstream 1 - Team around the School Model (TATS) which is now in now in place. To support the weekly meetings, a range of documents including a toolkit is being procured. This is an open access bank of resources that will support schools. It also includes a directory of local service which can be accessed and contacts for lead practioners in each field. This strand also feedback into the new digital Local Offer which is be created as part of PAP 2 on the SEND Area Action Plan for Halton.

WS 2- Inclusion Lead Practitioner - On track (implementation)

After the design phase, this has now started to be implemented in a number of ways. This has been closely linked to the training of Halton Staff in both Thrive Approach and the ability for our EP service to offer TEAM Teach training. The Specialist Teacher Service are leading of the inclusive practice for each of their specialist areas. Our Resource Bases are supporting mainstream settings with inclusive practices. This was co-designed and a framework set at our DBV ‘Learning Lunch’ event in September.

WS 2- Headteacher Coach and Influence Model - On track (co-design phase)

Our Principal EP has consulted with Headteachers on the best approach to this. The outcome has been a hybrid bespoke approach in the form of both online and face to face – both group and one to one. We are utilising the existing cluster groups in the first instance to support Headteachers, followed by both in person and online meetings.

Measuring impact

You should outline if there has been any emerging impact from the workstream, aligned with your implementation plan. Key measures may include outcomes

Top Level Measures

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Electively Home Educated EHCP as of Sept 24			8
SEND transport Spend (Sept 2024)		IN borough	427 pupils £1,698,456
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national rate, it is difficult to tell whether the current interventions impacted the outcome because the improvement was experienced nationally.

- Program Lead, Data Analyst and temp inclusion manager appointed June 24. Both and have undergone the training required to implement the agreed plan.
- Data Analyst built a dashboard for regular impact of the DBV grant – September 24

Has there been any slippage in delivery plans?

During co-design meeting with schools and settings it became apparent that we would need to phase implementation of workstream two with care, so not to overload schools and settings. This may mean some revision to implementation dates to be determined.

Overall progress on total opportunities including, implementation plan and DSG management plan

No additional opportunities were identified

DSG plan will continue to be maintained. The latest updated version will be available to share from Jan 2025

Is there anything else you would like to raise in this report?

In the submission, we projected roll out over two years, due to the level of school engagement required, it is difficult therefore to always level the current spend with the expected spend, as we know the roll out of our projects will take longer, by design. We believe this will allow a lasting positive change. This will be agreed within our local governance structures and shared at the next review meeting.

Have you encountered problems where you'd like DfE's support, where feasible, to address?

Support has been sought and given from DfE to ensure effective reporting approach.

Appendix 1 – Grant application



Halton Grant
Application Resubmis

Appendix 2 – Media Articles of impact

[Halton Borough Council chooses Thrive for school wellbeing drive – Education Today \(education-today.co.uk\)](https://www.education-today.co.uk/news/2023/04/12/halton-borough-council-chooses-thrive-for-school-wellbeing-drive/)

[Council mental health support | Public Sector News \(publicsectorexecutive.com\)](https://www.publicsectorexecutive.com/news/council-mental-health-support/)

Appendix 3 – Halton Local offer page for DBV

[Delivering Better Value \(DBV\) in SEND | Local Offer \(haltonchildrenstrust.co.uk\)](https://www.haltonchildrenstrust.co.uk/local-offer/)