

## SCHOOLS FORUM

### AGENDA

Thursday 5 December 2024 at 1pm

via videoconferencing


**Membership:** Tony Eginton (Chair), Phil Haigh (Chair of Sub-Groups), Shabana Aslam, Kate Needs, Kris O’Sullivan, Mel Penney, Carly Rissen, John Buckingham, Jo Palmer, Dan Cowling, Jenny Rigby, Harshinder Buttar, John Garner, Nicola Edwards, Nicola Kelly, Helen Manwaring, Liam McGillicuddy, Ben Spinks, Sudhi Pathak, Paul Chambers, Elaine Caffary, Naazish Haq, Jonathan Jacob.

**Shadow Reps/Observers:** Debbie Gilder, Louise Crook, Nicky Bulpett, Graham Wells, Bryony Smith, Pearl Greenwald.

**Officers:** Andrew Good, Danny Doherty, Bharti Bhoja, Abi Preston, Michael Hawkins, Julie Kelly, Philip Ryan, Kate Boulter(Clerk)

### AGENDA

	Item	Approx. time	Lead	Update
1	Welcome, apologies & opening comments	1300-1310	Chair	Oral
2	Notification of Any Other Urgent Business	1310 - 1315	Chair	Oral
3	Minutes: a) Meeting held 16 October 2024 b) Extraordinary Meeting held 18 November 2024	1315-1325	Chair	Oral
4	Items for Decision a) School Block De-delegations b) Trade Union De-delegation c) Disapplication Survey Feedback & Application	1325-1410	AP/AG/SW	Report Report
5	Items for Information a) School Forum Survey Results b) DSG Budget Monitoring c) Banding Review Update	1410-1450	AG/ AP	Report Report Report Report
6	For note – agenda items for next meeting (as per forward plan)	1450-1455	Chair	Oral
7	AOB (if any)	1455-1500	Chair	Oral

	<p><b>London Borough of Hillingdon Schools Forum 5th December 2024</b></p>
<p><b>Title</b></p>	<p><b>School Block De-Delegation Information 2025/26</b></p>
<p><b>Agenda Item</b></p>	<p><b>4a</b></p>
<p><b>Report by</b></p>	<p>Andrew Good</p>
<p><b>Appendices</b></p>	<p>N/A</p>
<p><b>Recommendation(s)</b></p>	<p> <input type="checkbox"/> Information  <input type="checkbox"/> Consultation  <input checked="" type="checkbox"/> Decision         </p>

**1 Introduction**

1.1 This paper presents the feedback from the consultations for the key proposed School Block De-delegations for 2025/26.

**2 Recommendation**

2.1 Representatives of Schools Forum are requested to make a decision on de-delegations from Schools Block.

**3 Background**

3.1 There are five key LBH de-delegations for which a decision is required by School Forum and which were presented in detail as part of the October 2024 School Forum meeting (Agenda item 7c). They are as follows:

- Growth / Falling Rolls Fund;
- Education Statutory Duties (what was formerly the Education Support Grant ESG);
- Contingency Fund for Schools in Financial Difficulties;
- Pensions Administration
- Oak Wood De-Delegation

3.2 De-delegations are transfers from the School Block to the Local Authority to spend on the purposes outlined within each de-delegation, they apply to all maintained Primary and Secondary schools or none if rejected. Individual schools are not in a position to opt in or out once School Forum have made a decision. For completeness the details of the de-delegations presented in October are included in the appendix to the report below.

3.3 Separate votes are required for each de-delegation by maintained primary and secondary maintained schools. A consultation was carried out with schools to ask them to vote on the key proposals that would impact budgets:

- 2.5% Schools block transfer (maintained and academy schools)– see separate paper (not a de-delegation a transfer)

- General education duties (formerly ESG)
- Contingency fund for schools in financial difficulties
- Support towards Oak Wood's deficit

3.3 For the following items, forum representatives will vote during December's meeting based on views from their sector. These items are:

- Pensions admin de-delegation
- Growth and Falling Rolls Fund

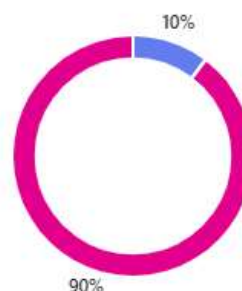
3.4 The feedback from schools following consultation on the four items above are as follows:

Education Statutory Duties – estimated to be £200k(to be confirmed once DSG funding is confirmed)

3.5 A consultation was carried out with schools to vote on the de-delegation for general duties. The results are as follows:

8. Do you agree to de-delegate £200k from schools block to fund the statutory general education duties? This equates to roughly £10.93 per pupil. (see page 67)

● Yes 7  
● No 61



90% (61) of schools disagreed with the de-delegation. 10% (7) agreed.

3.6 Contingency Fund for Schools in Financial Difficulties - £200,172

9. Do you agree to de-delegation of £200,172 from schools block to fund a contingency fund to assist maintained schools in financial difficulty? (see page 66)

● Yes 1  
● No 67



99% (67) disagreed with de-delegation for this item. 1% (1) agreed with the proposal.

### Oak Wood De-Delegation

- Schools were asked to vote whether to support Oak Wood School's request to de-delegate towards the school's deficit.

10. Do you agree to de-delegation from schools block to the value of £500k to contribute towards Oak Wood's deficit further to the school's request? This equates to roughly £28.72 per pupil. (see page 74)

● Yes	1
● No	67



99% (67) disagreed with de-delegation for this item. 1% (1) agreed with the proposal.

### Pensions Administration

Following the removal of the Education Services Grant (ESG), local authorities needed to agree with maintained schools whether they wished funding to be retained to fund the continuation of education services previously funded by the ESG, with the mechanism for this being through de-delegation.

In recent years, the only function that Schools Forum has voted to de-delegate is Teachers Pensions administration and the proposal is that this continues for 2024/25.

The cost of this de-delegation is £1.28 per pupil.

The de-delegated amount reflects a contribution to the cost of the post responsible for the maintenance and reconciliation of Teachers Pensions payments, the identification and follow-up of any queries with schools and payroll providers and the payment of deductions to the Teachers Pensions Agency.

Should the proposal to de-delegate for Teacher Pensions administration not be agreed by Schools Forum, maintained schools will be required to deal with any queries that the Council receives from Teachers' Pensions, as the Council will no longer be able to liaise directly with the Payroll provider.

## Appendix to Report

### New Growth Fund formula

4.1 The government introduced a formulaic approach to allocating funding for pupil growth four years ago, rather than using levels set by each LA. The growth fund grant allocation funds:

**Implicit Growth** - the regulations require new schools building up their numbers to be funded through the formula for pupils forecasted to join such schools in the September of each financial year; and

**Explicit Growth** – expansions of existing schools and bulge classes to meet basic need. This funds schools for additional classes that would not otherwise be funded in that financial year due to the lagged nature of the school funding formula.

Hillingdon's explicit growth fund rules for expansions of existing schools and bulge classes in 2024 to 2025 were:

**Expansions** - Calculated by taking the total AWPU funding for the year, divided by the total number of pupils and multiplying by 30 (assumed class size), then pro rata 7 months (reflecting new class starting in September covering funding until the new financial year in April). A school will attract this funding for every year of an expansion, until the school has reached full capacity/ end of the expansion.

**Bulge Class** - Growth funding is also provided for schools who have significant growth in pupil numbers who are not expanding. If a school has an increase of over 25 pupils in the lowest year of the school, funding will be provided for each additional form of entry (assumed to be 30 pupils) which is calculated using the average AWPU rate for the year. This calculation will be carried out termly and funding provided proportionally. For academy schools who are expanding, the LA will also provide funding for the period April to August, to reflect the difference in funding year compared to maintained schools. This funding is calculated at 5/12ths of average AWPU multiplied by 30

For the first time in 2024 to 2025 local authorities are required to provide growth funding in all cases where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area (either as a bulge class or as an ongoing commitment).

As a minimum local authorities will have to provide funding to a level which is compliant with the following formula: **primary growth factor value (£1,550) × number of pupils × ACA.**

In Hillingdon for 2024-25 this equated to **£51,237** for 1 additional form of entry. The primary growth factor value will be used for all school types, recognising there is one teacher pay scale and that this funding is a minimum value.

Hillingdon's criteria, which uses AWPU, is **above**, and therefore compliant with, this **minimum value**.

5.7A review of the Growth Fund Contingency requirement, which provides funding for expanding schools and funding for significant in-year growth, estimates that the budget in 2025/26 should be £TBD, an increase / decrease of £TBD from the previous year. The calculations include 1 growing Primary School, 1 Growing Secondary school and contingency for funding of year 6 pupil classes over pan in Secondary schools etc.

5.8 The growth funding allocated through the funding formula for 2025/26 is £TBD which is sufficient to cover the growth requirements due to an overall increase in Pupil number of TBD in Hillingdon and is a decrease from 2024/25 of £TBD.

**The actual allocations will be confirmed in the January budget paper once the DfE have provided their final allocations to us.**

## **6. Falling Rolls**

6.1 In 2024/25, for the first time government allocated funding to local authorities based on falling rolls as well as growth. Funding was allocated based on year-on-year reductions in pupil numbers at medium super output areas (MSOA) level. MSOAs are small geographical areas, within wards. Allocations were based on differences between the primary and secondary number on roll at schools located within each MSOA between the most recent October pupil census and the census in the previous October.

6.2 The falling rolls allocation for each local authority was £140,000 + area cost adjustment (ACA) per MSOA which sees a 10% or greater reduction in the number of pupils on roll between the two census years.

6.3 Hillingdon did not meet the criteria of the MSOA in 2024/25.

6.4 Local authorities will continue to have discretion over whether to set aside schools block funding to create a small fund to support schools with falling rolls.

6.5

## **7. Provisional Funding at Schools Level – Transfer from Schools Block for 2025/26**

7.1 The service is arranging for an extraordinary meeting of the Schools Forum in November to consider the proposal for 2025/26 to transfer funds from the Schools Block to support the High Needs Block.

## **8. Funding of general duties for maintained schools**

8.1 Local authorities can fund services previously funded from the general funding rate of the Education Services Grant (ESG) from maintained schools budget shares, with the agreement of maintained school members of the Schools Forum.

8.2 Until 1 April 2017 the Council received an ESG to cover the cost of delivering its responsibilities in respect of schools. This had two elements, a retained duties element covering the Council's duties to all schools (which now forms the Central Schools Services Block of the Dedicated Schools Grant) and a general duties rate which related to maintained schools only. The general duties rate ended on 1 April 2017 with a transitional grant being payable to local authorities for 2017/18. This resulted in a reduction in the Council's grant income of c£2M from 2018/19 whilst the duties remain.

- 8.3 In light of the reductions in grant funding the cost of services across the Council were reviewed and significant budget reductions were made. This has enabled the Council to reduce the cost of the services that were previously funded by the ESG to a significantly lower level. This has however limited the scope of the services that can be provided to schools to a minimum level that is needed to discharge the Council's responsibilities.
- 8.4 Until now the Council has never asked maintained schools to contribute towards these statutory services and has instead managed to pay for all such costs through the Council's General Fund. However, due to significant inflationary pressures over the past few years and increasing duties and responsibilities regarding general duties carried out by the Council on behalf of its maintained schools, this is no longer tenable and the Council is therefore proposing to charge (top slice) the maintained schools budget share in 2024/25, for a contribution towards these costs.
- 8.5 The Council proposes to charge the maintained school budget shares £10.93 per pupil (based on 2024/25 rates) to cover the costs of the services listed below, which were previously funded by ESG.
- £10k - monitoring of National Curriculum assessments (Schedule 2, paragraph 76)
  - £60k - expenditure on inspecting attendance registers under the Education (Schedule 2, paragraph 80)
  - £50k - appointment of governors and payment of governor expenses (Schedule 2, paragraph 74)
  - £10k - functions under the Equality Act 2010 (Schedule 2, paragraph 72)
  - £50k - appointment or dismissal of employee functions (Schedule 2, paragraph 67) and consultation costs relating to staffing (Schedule 2, paragraph 68).
  - £20k - monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Schedule 2, paragraph 60)

## **9. De-delegation for a contingency fund to support maintained schools in financial difficulty**

- 9.1 The Council is proposing to create a contingency fund of £200,172 to assist maintained schools in financial difficulty. It is most likely that this fund will be used to contribute towards the redundancy costs of schools in financial difficulty, where they are taking action to help balance their budgets by restructuring their staffing establishments. This represents £10.93 per pupil of the maintained schools budget shares.
- 9.2 Schedule 2 of the School and Early Years Finance Regulations 2023 allows for the creation of such a contingency fund by top slicing (de-delegating) maintained schools' 24/25 budgets. The funds will then be redistributed to schools in financial difficulty through the new collaborative process, where the Council will be working more closely with maintained schools in financial difficulty in order to help them remain in surplus.

9.3 Each maintained primary and secondary school member representative will decide for their phase.


## **10. De-delegation - notes**

10.1 DfE allow funding for specified services to be de-delegated for maintained primary and secondary schools with Schools Forum approval.

10.2 At the schools Forum meeting on 6 December 2023 Maintained School Representatives of Schools Forum voted to de-delegate the Teachers Pensions Administration for maintained schools in 2024-25 at a rate of £1.28 per pupil.

10.3 It should be noted that the proposal to de-delegate Trade Union facilities time contributions for 2025/26 was rejected by representatives of maintained schools at the Schools Forum meeting on 6 December 2023.



	<b>London Borough of Hillingdon Schools Forum 5 December 2024</b>
<b>Title</b>	<b>Trade Union De-delegation</b>
<b>Agenda Item</b>	<b>4b</b>
<b>Report by</b>	Simon Warne, NEU
<b>Appendices</b>	N/A
<b>Recommendation(s)</b>	<input type="checkbox"/> Information <input type="checkbox"/> Consultation <input checked="" type="checkbox"/> Decision



# **The NEU Case for Facilities Time Arrangements for Trade Union Local Officers**

## **1. Summary**

- 1.1 Every London Borough has an established 'facilities pot,' as does the majority of Local Authorities in England and Wales. This is a fund paid into by schools to provide paid release of a teacher for trade union duties and activities across a defined authority. This report presents the case for adequate facility time arrangements for schools in Hillingdon, to give local trade union officers the time they need to support educators and strengthen employer-union relationships in schools. These arrangements allow schools to fulfil their legal obligations including representation and consultation with staff.
- 1.2 Trade union local officers play a crucial role in carrying out complex and demanding activities. This includes providing advice and representation for educators, negotiating with school leaders, engaging in statutory consultations, helping manage workplace change, handling casework, promoting equality, and promoting workplace health and safety.
- 1.3 The London average yearly funding figure for facility time is around £5 per pupil (equivalent to £200,000 for 40,000 pupils). Hillingdon's current funding figure is £2.19 per pupil (equivalent to £87,600 for 40,000 pupils). The NEU believes that Hillingdon is an outlier in the current buy in level. It is also a clear outlier in its decision not to de-delegate Trade Union Facility Time.

## **2. Recommendations**

- 2.1 Hillingdon National Education Union is recommending that:
- 2.2 The Schools Forum returns to de-delegated funding for Trade Union Facilities Time, as existed before the 6<sup>th</sup> of December 2023.
- 2.3 The per pupil funding is adjusted to reflect the [increased school funding in 2023](#) and the requirement for appropriate levels of release time for branch

caseworkers. The NEU proposes a yearly funding figure of £120,000 to be de-delegated for Trade Union Facility Time. This is an estimated figure based on 40,000 pupils at £3 per pupil for Hillingdon.

2.4 As with maintained schools, all academies receive funding to contribute to facilities time. The NEU recommends that all Academy Schools in the London Borough of Hillingdon should buy into the facilities funding agreement. We believe they should contribute on a basis of equity to allow their staff access to trained trade union officers.

2.5 A formal position be established on the Schools Forum specifically for trade union representation, as per paragraph 47 of the [Schools Forum operational and good practice guide 2021](#).

### 3. Background

3.1 Until 2023, Hillingdon maintained a de-delegated fund intended for compensating the paid release of local officers representing school Trade Unions. However, in December 2023, the Forum raised concerns regarding the lack of evidence of how the money was spent and its impact, and issues of transparency and fairness in relation to the funding being taken only from maintained schools and not academies.

3.2 In fact, the NEU Branch Secretary has consistently prepared termly reports to Schools HR on TU activity and there has existed transparency throughout this arrangement. The NEU is concerned that the Forum has not been provided these reports until recently, the responsibility of the Local Authority and Schools HR. However, the NEU does acknowledge the issue of fairness in respect of the funding only being taken from maintained schools and the NEU proposes that the Forum establishes a facility for all academies to buy into the facilities pot.

3.3 Given these developments, there is a compelling necessity to reinstate this fund. Doing so would enable the allocation of resources for the purpose of releasing a school-employed staff members capable of effectively performing the duties associated with the Branch Secretary role.

## 4. Benefits

**4.1 Managing Change** - Effective local union officers can help school leaders and union members alike understand the impact of organisational changes; help to resolve reorganisation issues; support TUPE meetings: and pass on ideas from staff. By doing so, they can help to minimise the impact of changes on schools. The expertise of experienced trade union officers should not be lost to school leaders.

**4.2 Casework and Working Day Meetings** -Funding for time off allows trade union local officials to attend meetings during the working day. Without it, meetings such as disciplinary, grievance, ill health and capability meetings - formal or informal - and consultation meetings on changes to working arrangements would be much more difficult to arrange and may result in an employer not meeting their statutory responsibility. Meetings would usually have to take place in the evening or at weekends, affecting everyone involved.

**4.3 Cost-Benefit Analysis** - The comprehensive assessment of the contribution by union reps and officials towards improved business performance was made by the then Department of Business, Enterprise and Regulatory Reform, (now the Department for Business, Energy and Industrial Strategy).

**4.4 Productivity and Savings**- Key findings of [the BERR's report, published as part of the University of Hertfordshire 2012 Report](#) found that the work of union reps resulted in: Savings to employers and the exchequer of between £22m - £43m as a result of reducing the number of Employment Tribunal cases;Benefits to society worth between £136m - £371m as a result of reducing working days lost due to workplace injury and;Benefits to society worth between £45m - £207m as a result of reducing work related illness.

**4.5 Return on Investment** -It can reasonably be estimated that the work of union reps also results in: Overall productivity gains worth between £4bn to 12bn to the UK economy, Savings of at least £19 million as a result of reducing dismissals and Savings to employers of between £82m - £143m in recruitment costs as a result of

reducing early exits. [This and further evidence illustrating evidence of the benefits of facilities time can be found here.](#)

**4.6 Resolving Issues** - Good local union officers help to resolve issues at an early stage. Lack of Facilities Time funding will mean fewer issues would be resolved informally, resulting in a significant increase in costs to schools and workload for school leaders and LA officers. Disciplinary, grievance and capability issues would be more likely to escalate, with cases more likely to reach employment tribunals. Local officers are experienced in all the types of casework. Often grievance cases can be dealt with informally rather than take up a lot of school time. It is often the case that grievances are between members of the same union. Our approach outside of school's official procedure saves schools many hours of work. Settlement agreements are another area where the Union is central to negotiations. Sometimes this is the fairest answer to resolve long - term sickness issues or situations where the Teacher would welcome a new start. Often hours of meeting time are saved by using this route, leaving both parties able to move forward.

**4.7 Other Benefits** - Trade unions provide valuable services, including professional CPD training for members that benefit employers. Without facilities time, opportunities for local officers to liaise with members are limited, potentially leading to the loss of training benefits. Courses on health and safety, behaviour management, leadership, equalities, and teaching and learning contribute to enhancing both staff performance and overall school environment. [Some examples of the CPD offered to NEU members can be found here.](#)

**4.8 The Importance of Adequate Funding** - If a school does not pay into the pot, it inevitably causes delay. A union member seeking representation will be allocated someone employed by the union, such as a case worker or Regional Officer, who would not be able to respond in anything like the same time frame that local officials would. Delay will put a strain on the member and the school. They are very professional but at a disadvantage in not being as familiar with Hillingdon schools as local officers.

## 5. Conclusion

5.1 Returning to a de-delegated pot for trade union local officers is a prudent investment that yields substantial benefits for schools, employers, and society at large. The valuable contributions of these officers, ranging from managing change and resolving issues to promoting productivity and providing training, justify the modest financial support. By pooling resources, schools can ensure efficient and timely access to the expertise of trade union local officers, contributing to the effective delivery of education and the overall success of the educational system.

5.2 Reinstating the de-delegated funding will bring Hillingdon in line with standard practice and avoid Hillingdon remaining an outlier amongst London Boroughs.



London Borough of Hillingdon  
Schools Forum  
5th December 2024

<b>Title</b>	<b>Schools Block Transfer Consultation Responses</b>
<b>Agenda Item</b>	<b>5c</b>
<b>Report by</b>	Abi Preston
<b>Appendices</b>	
<b>Recommendation(s)</b>	<input checked="" type="checkbox"/> Information <input type="checkbox"/> Consultation <input type="checkbox"/> Decision

1. **Purpose:** To review feedback from schools following the consultation on the proposed 2.5% Schools Block transfer.

2. **Consultation:**

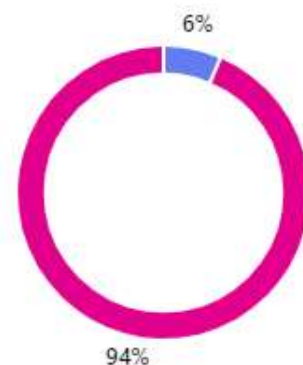
Forum members were asked to vote for the schools block transfer proposal presented during the November extra-ordinary meeting. Members voted as follows:

Agree – 1 member  
Disagree – 14 members

Following the extra-ordinary meeting, it was agreed that we would have a broader consultation due to the potential impact on all schools of the 2.5% proposal to ensure all schools were aware and could share their views. The results are as follows:

5. Do you support the transfer of 2.5% of schools block to the high needs block?

● Yes 6  
● No 88



If you have answered no, what percentage transfer would you support?

- 0% - 66

- 0.2% - 2
- 0.5% – 8
- 0.75% - 2
- 1% - 1

*If you do not agree with the transfer of funds, do you have any further suggestions to enable the high needs deficit to reduce to an equivalent amount and enable the area to meet its duties within the allocated budget envelope?*

Please see below a selection of comments/themes that were received in the consultation in response to the above question

:

Comments/ themes	Response
Raise council tax	Due to funding regulations, we cannot use council tax to fund the high needs deficit.
The DfE should fund this deficit because the deficit was originally the result of changes they made in expanding the age range for children and young people in education.	Raised with DfE
Improved engagement with schools. Less use of independent provision by Hillingdon. Funded SRPs in secondary schools.	Agreed – we are working on both the INMSS placements and made significant progress. We are also in discussion with schools about secondary SRPs.
Improved financial management in the same way that we as schools are expected to manage our budgets and not have a deficit	The financial position is driven by the needs in the area and the financial management is important but doesn't necessarily change the costs of the support.
LA to ensure all schools are inclusive to SEND children LA to look at what other LA's have done to reduced their deficit	Agreed. We have looked at other areas and looked at all aspects of the system to improve the position. We continue to work with the DfE to ensure we are maximising all opportunities to meet our budget envelope more effectively.
In the absence of financial management plans, it is very difficult for schools to advise the LA on other funding streams. The council have substantial reserves, which we are aware are unusable given the safety valve programme, however, surely the LA and DFE could consider overriding this to ensure that pupil outcomes and education provision are not detrimentally affected? 2.5% will impact heavily on all children, in all Hillingdon schools. Where is the incentive to dip into these astronomical reserves to clear the historical debt and why should current Hillingdon pupils have to pay the price?	Please see comment from November Cabinet meeting which comments on the reserves:  <i>General Fund Balances and Earmarked Reserves are expected to total £28.2m should the additional measures be achieved, meaning total balances are forecast to be below the minimum threshold of £32m as approved by Cabinet and Council in February 2024 without further actions.</i>




### **3. Recommendations:**

Schools forum to note the contents of the consultation feedback. The Local Authority will share this feedback with the DfE to enable them to consider this as part of their decision as to whether to agree to the disapplication request.

The initial request had to be received by the DfE by 18<sup>th</sup> November 2024, which was actioned. The LA advised the DfE that the consultation feedback would be shared once received. Therefore, this information will be sent to them imminently.

Based on 2024/25 request, we expect to hear an outcome early in 2025 and will update forum once the decision is received.

	<b>London Borough of Hillingdon Schools Forum</b> 5 <sup>th</sup> December 2024
<b>Title</b>	<b>Schools Forum Survey Responses</b>
<b>Agenda Item</b>	<b>5a</b>
<b>Report by</b>	Abi Preston
<b>Appendices</b>	Members' survey responses and community survey responses
<b>Recommendation(s)</b>	<input checked="" type="checkbox"/> Information <input type="checkbox"/> Consultation <input type="checkbox"/> Decision

## 1. Purpose:

To review the responses from the two recent Schools Forum surveys – one for members and one for the community

## 2. Survey Findings:

### Schools Forum Members' Survey:

Hillingdon Schools Forum conducted a survey to gather feedback from its members regarding their roles, understanding, and perceptions of the forum's activities and effectiveness.

The survey results indicate a mixed level of confidence and understanding among the members regarding the roles, priorities, and functions of the Schools Forum. However, only 7 responses were received making it difficult to get an overall understanding of all forum members' views.

The High Needs and Early Years subgroups received mixed views on whether they are making a difference and some uncertainty about the role of Schools Forum in contributing to the Safety Valve programme.

The open feedback questions raised some key themes:

- A sense of wanting more forum members to take part in discussions rather than the one or two voices that are heard, which members felt represented the representatives' schools only. Members would like matters to be discussed to represent all schools across the borough.
- More information to be shared with the wider school leadership community
- A need for PVI's to have more information or understanding of Schools Forum

- A suggestion to share declarations of interest in meetings
- More governor representation in the meetings

Key areas for improvement include:

- **Training and Development:** There is a need for additional training and development to support members in their roles including for new members. Recent training was well received but members would like more.
- **Communication:** Improved communication is needed to ensure members are fully aware of the forum's priorities, risks, and decision-making powers.
- **Timeliness of Paper Distribution:** Ensuring that papers are distributed in a timely manner before meetings although there was a comment stating that papers are detailed. Members would like some face-to-face meetings occasionally.
- **Clarity on Roles and Expectations:** Providing clearer guidance on the roles and expectations of forum members.

## School Community Survey

Hillingdon Schools Forum conducted a survey to gather feedback from the school leadership community regarding their understanding, perceptions, and engagement with the Schools Forum. The survey aimed to identify areas for improvement and ensure that the Schools Forum effectively represents the interests of all schools and education providers in Hillingdon.

The survey received responses from 61 stakeholders, including headteachers, governors, and representatives from different school phases. The majority of respondents were headteachers from maintained primary schools.

### **Key Findings:**

**Understanding of the Schools Forum's Role** - A significant number of respondents indicated that they were aware of the role of the Schools Forum, with many answering "Yes" or "Partially" to this question. However, there were still some respondents who were not fully aware of the forum's role.

**Awareness of Priorities and Risks** - The survey revealed mixed awareness regarding the priorities and risks that the Schools Forum is addressing. While some respondents were confident in their understanding, others indicated partial or no awareness.

**Strategic Decision-Making** - Respondents generally felt that the Schools Forum is taking a strategic approach in decision-making, representing the best interests of all schools and education providers in Hillingdon. However, there were suggestions for improvement in communication and transparency.

**Positive Contribution** - Many respondents felt that the Schools Forum makes a positive contribution to improving the lives of children and young people in Hillingdon.

**Representation and Communication** - There were mixed responses regarding the knowledge of who represents their phase or sector on the Schools Forum. Additionally, some respondents indicated that they do not regularly receive updates on decisions made and upcoming agenda items.

**Engagement and Feedback** - The survey highlighted a need for better engagement with the community. Many respondents indicated that they are not routinely asked for their views on agenda items to inform discussions at Schools Forum meetings.

**Public Accessibility** - The Schools Forum is a meeting open to the public, but attendance in the last two years was low among the wider community of school leaders.

**Access to Information** - While Schools Forum papers are publicly available, some respondents were not aware of where to find the published meeting papers. This indicates a need for better communication and accessibility of information.

**Interest in Membership** - A few respondents expressed interest in becoming members of the Schools Forum but were unsure of the process. This suggests a need for clearer information on how to join the forum.

### **Recommendations**

1. **Increase Awareness and Understanding** – Raise more awareness of the role, priorities, and risks addressed by the Schools Forum. Ensure primary and secondary Headteacher groups share (or signpost) papers and information on key decisions that are due to be discussed.
2. **Enhance Communication and Transparency** - Improve the distribution of updates and agenda items to ensure that all stakeholders are informed and can provide input.
3. **Encourage Public attendance** - Promote the public nature of Schools Forum meetings and encourage attendance.
4. **Improve Access to Information** - Ensure that all stakeholders know where to find published meeting papers and other relevant information.
5. **Facilitate Membership Process** - Provide clear information on how to become a member of the Schools Forum. Consider providing information to explain the process.

## **3. Appendices**

Appendix 1: Members Survey Findings (p4)

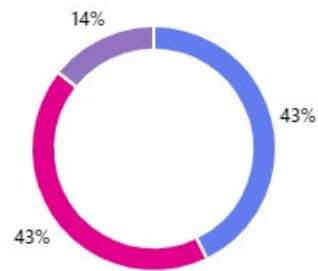
Appendix 2: School Community Findings (p11)

## Appendix 1: Members Survey Findings

1. In what capacity are you responding to this survey?

[More details](#)

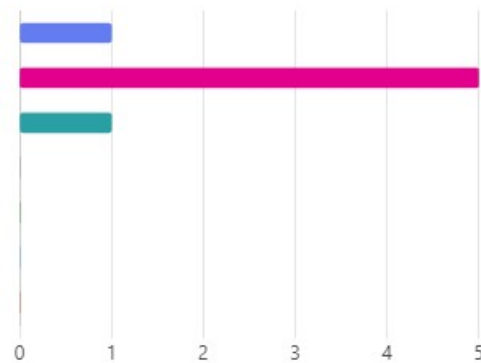
● As a Headteacher	3
● As a Governor	3
● Representative of an Academy	0
● Other	1



2. Which of the following do you represent?

[More details](#)

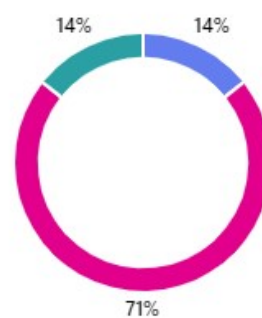
● Academy School	1
● Maintained School	5
● Early Years Provider	1
● 16-19 Provider	0
● Maintained Special School	0
● Academy Special School	0
● Other	0



3. Which of the following phases do you represent?

[More details](#)

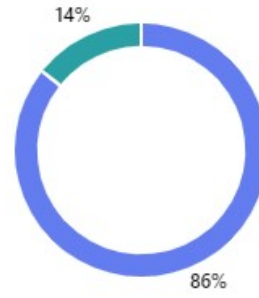
● Early Years	1
● Primary	5
● Secondary	1
● Other	0



4. Do you know what the role of Hillingdon Schools Forum is?

[More details](#)

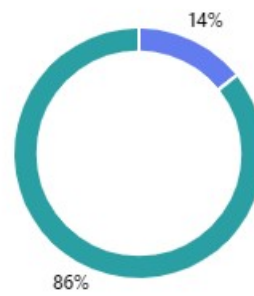
● Yes	6
● No	0
● Partially	1
● Don't Know	0



5. Do you know what the priorities are for Hillingdon Schools Forum over the next 2 years?

[More details](#)

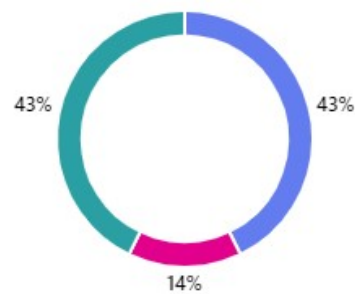
● Yes	1
● No	0
● Partially	6
● Don't Know	0



7. Do you feel that the two sub-groups of Schools Forum (High Needs and Early Years) are making a difference?

[More details](#)

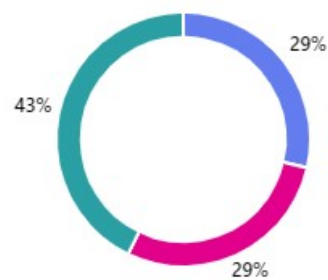
● Yes	3
● No	1
● Partially	3
● Don't Know	0



8. Do you feel clear about the role of Schools Forum in contributing to the Safety Valve programme?

[More details](#)

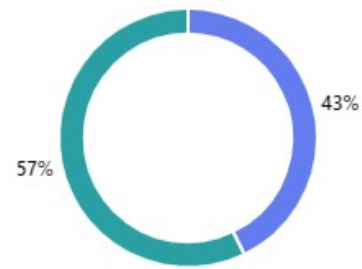
● Yes	2
● No	2
● Partially	3
● Don't Know	0



9. Do you feel that Schools Forum makes a positive contribution to improving the lives of children and young people in ...

[More details](#)

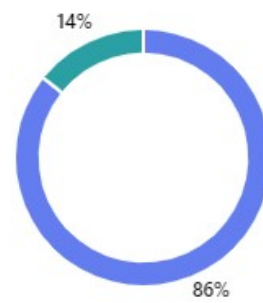
● Yes	3
● No	0
● Partially	4
● Don't Know	0



10. Are you clear what is expected of you in your role on Schools Forum?

[More details](#)

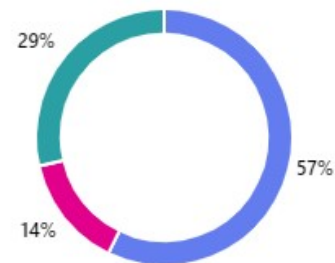
● Yes	6
● No	0
● Partially	1
● Don't Know	0



11. Do you feel confident in knowing when Schools Forum can use its powers to make decisions and when it cannot?

[More details](#)

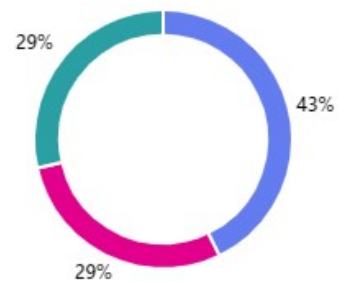
● Yes	4
● No	1
● Partially	2
● Don't Know	0



12. Do you feel confident in contributing to the discussion and debate at Schools Forum?

[More details](#)

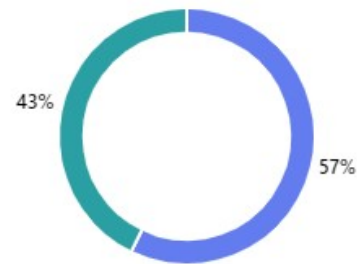
● Yes	3
● No	2
● Partially	2
● Don't Know	0



13. Do you feel that you need more training and development to support you in your role on Schools Forum?

[More details](#)

● Yes	4
● No	0
● Partially	3
● Don't Know	0



14. What would be your main areas for training and development?

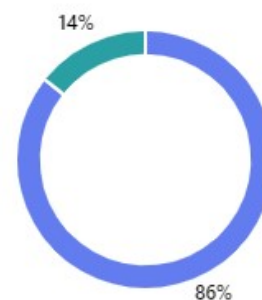
4 Responses

ID ↑	Name	Responses
1	anonymous	Contributing correctly to forum debates so iypts not only the one or two voices being heard for one or two schools!
2	anonymous	I attended the training in October and found it very helpful- something that I would have found very beneficial when I started as it has taken me a long time to really understand all the different things that Schools Forum covers. A refresher with updates regularly, and at least annually would be helpful.
3	anonymous	CURRENT EVENTS
4	anonymous	Better understanding of budget formulae/& how central costs are calculated

15. Do you feel that the papers presented to Schools Forum help you to understand the key developments and issues tha...

[More details](#)

● Yes	6
● No	0
● Partially	1
● Don't Know	0



16. What are the key areas you feel Schools Forum need more information about?

1 Responses

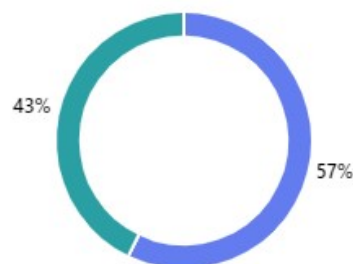
ID ↑	Name	Responses
1	anonymous	Safety Valve Agreement. More information behind central costs instead of global figures



17. Do you feel that the papers presented to Schools Forum help you to brief the sector/phase you are representing?

[More details](#)

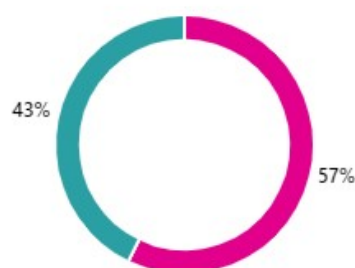
- Yes 4
- No 0
- Partially 3
- Don't Know 0



18. Do you feel that you receive the papers in good time, before the meeting of Schools Forum?

[More details](#)

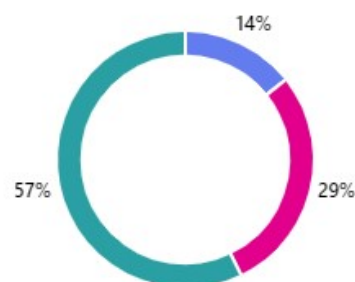
- Yes 0
- No 4
- Partially 3
- Don't Know 0



19. Do you feel that Schools Forum communicates effectively to the wider schools and providers in the Borough, on the ...

[More details](#)

- Yes 1
- No 2
- Partially 4
- Don't Know 0



20. What do you think Schools Forum could do to improve communications and engagement?

4 Responses

ID ↑	Name	Responses
1	anonymous	The forum is for all schools in the borough not just the one or two we hear about regularly
2	anonymous	Perhaps to share more information directly to school leaders, perhaps termly, so that they know what are the key things that Schools Forum are currently making decisions or being informed about.
3	anonymous	I do feel the PVI sector should on a whole have more engagement or at the very least knowledge about this platform. Perhaps within provider meetings a brief overview of the recent forum discussion and a chance for any thoughts in the wider sector can be aired so the representatives can share them to the forum in the next meeting.
4	anonymous	Improve timeliness of papers in advance of meeting to enable members to be fully engaged. F2F meetings so all participants are actively engaged and not sidetracked by other matters on their desks

21. Schools Forum is a meeting open to the public. Would you say this is working well?

[More details](#)

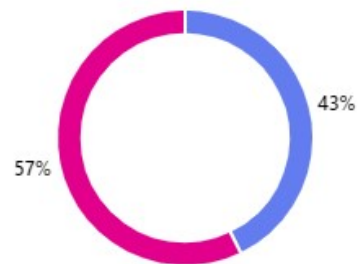
● Yes	1
● No	5
● Partially	1
● Don't Know	0



22. Schools Forum papers are publicly available. Would you know where to find the published meeting papers?

[More details](#)

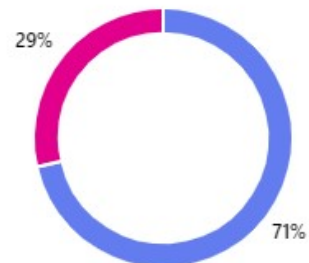
● Yes	3
● No	4



23. Are you confident you know how the nominations and voting arrangements work for new members to join Schools ...

[More details](#)

● Yes	5
● No	2
● Partially	0
● Don't Know	0



24. What do you feel is working well in Schools Forum?

4 Responses

ID ↑	Name	Responses
1	anonymous	We are trying to deal with the issues being faced by all schools and pupils
2	anonymous	There is a good amount of discussion about key agenda items by more knowledgeable members of the Forum. This does help those less experienced or knowledgeable members to have a greater understanding. There are detailed papers provided before meetings. They do make very considered decisions for the benefit of Hillingdon children.
3	anonymous	It is an excellent body to bring together leaders of educational facilities within the borough, share needs for funding matters and ensure a more just delivery of the funding is put into place
4	anonymous	Engagement with stakeholders in regard to difficult decision making. Shadow reps being skilled up

25. What do you feel needs to improve, to be an effective Schools Forum?

4 Responses

ID ↑	Name	Responses
1	anonymous	We are there for all schools not the one or two we hear about regularly
2	anonymous	Having remote meetings does make it very hard to discuss with members the items on agendas. Meetings mainly have contributions from a few members. Having a face to face meeting occasionally would be helpful for more discussion about key issues- particularly for less experienced members so that they are able to contribute more.
3	anonymous	having training for new members prior to joining, sharing with the wider community out of the forum
4	anonymous	No of officers attending limited on occasions more officers then reps. /Annual training . Declarations of interest during matters that impact more directly on key personnel.

26. Please use the space below to provide any further feedback, ideas or suggestions to Schools Forum, to inform the review.

2 Responses

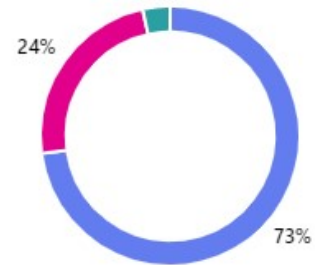
ID ↑	Name	Responses
1	anonymous	Change is needed to the membership so more representation from governors to join the forum and we need to focus on all schools in every meeting
2	anonymous	Action plan for improvement regularly reviewed

## Appendix 2: School Community Findings

1. In what capacity are you responding to this survey?

[More details](#)

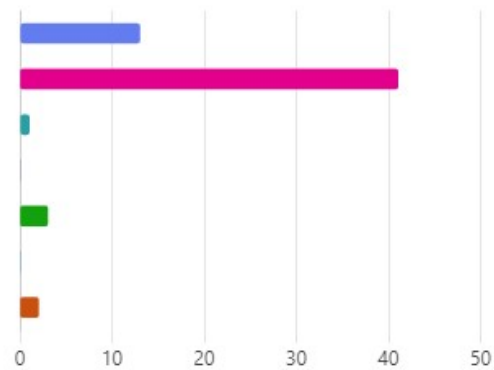
As a Headteacher	43
As Chair of Governors	14
Other	2



2. Which of the following do you represent?

[More details](#)

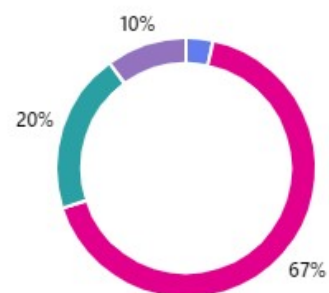
Academy School	13
Maintained School	41
Early Years Provider	1
16-19 Provider	0
Maintained Special School	3
Academy Special School	0
Other	2



3. Which of the following phases do you represent?

[More details](#)

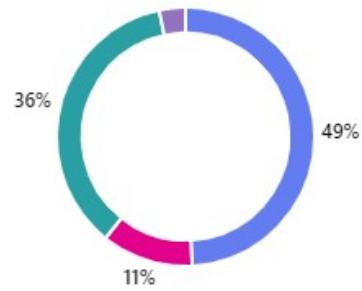
Early Years	2
Primary	40
Secondary	12
Other	6



4. Do you know what the role of Hillingdon Schools Forum is?

[More details](#)

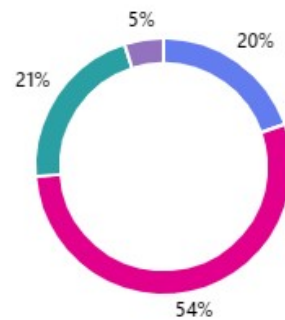
● Yes	30
● No	7
● Partially	22
● Don't Know	2



5. Do you know what the priorities are for Schools Forum over the next 2 years?

[More details](#)

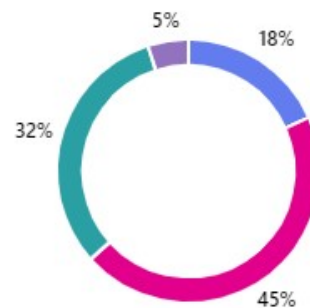
● Yes	12
● No	33
● Partially	13
● Don't Know	3



6. Would you be confident in saying you would know what the risks are that Schools Forum is working to address over t...

[More details](#)

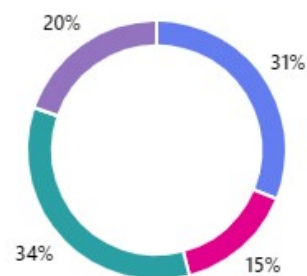
● Yes	11
● No	27
● Partially	19
● Don't Know	3



7. Are you confident that Schools Forum is taking a strategic approach in decision making by representing the best interes...

[More details](#)

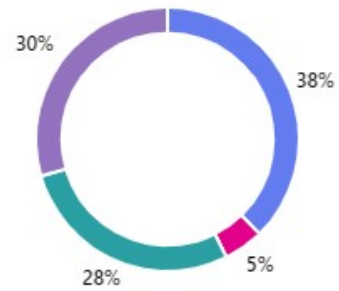
● Yes	19
● No	9
● Partially	21
● Don't Know	12



8. Do you feel that Schools Forum makes a positive contribution to improving the lives of children and young people in...

[More details](#)

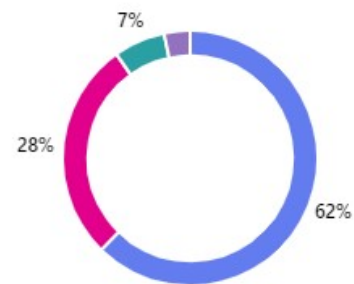
● Yes	23
● No	3
● Partially	17
● Don't Know	18



9. Do you know who represents your phase / sector on Hillingdon Schools Forum?

[More details](#)

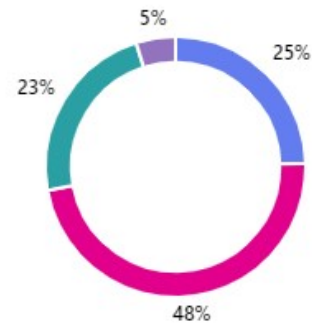
● Yes	38
● No	17
● Partially	4
● Don't Know	2



10. Do you regularly receive updates from Schools Forum on decisions made and upcoming agenda items?

[More details](#)

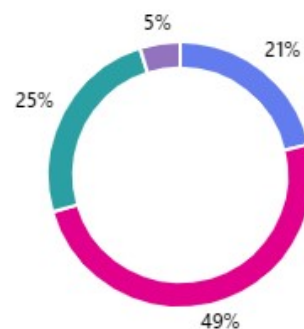
● Yes	15
● No	29
● Partially	14
● Don't Know	3



11. Do you routinely get asked for your views about Schools Forum agenda items, to inform the discussion at Schools F...

[More details](#)

● Yes	13
● No	30
● Partially	15
● Don't Know	3

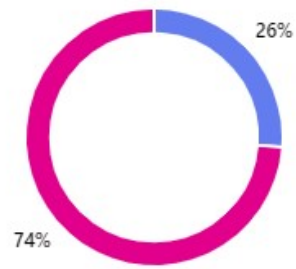


12. Schools Forum is a meeting open to the public.

[More details](#)

Have you attended a Schools Forum in the last 2 years?

● Yes	16
● No	45

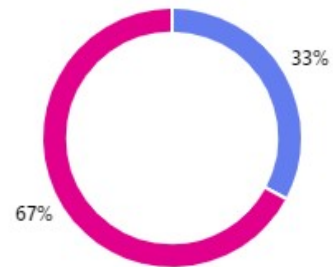


13. Schools Forum papers are publicly available.

[More details](#)

Would you know where to find the published meeting papers?

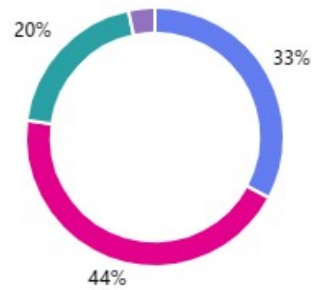
● Yes	20
● No	41



14. If you were interested in becoming a member of Schools Forum, would you know what to do?

[More details](#)

● Yes	20
● No	27
● Partially	12
● Don't Know	2




15. Please use the space below to provide any feedback, ideas or suggestions to Schools Forum, to inform the review.

#### 11 Responses

ID ↑	Name	Responses
1	anonymous	I am a member of the forum
2	anonymous	A yearly newsletter about SF and what it has done each year might be good to keep everyone fully informed.
3	anonymous	I am interested in joining Schools Forum as a Chair of Governors. I replied to Abi Preston but couldn't attend the training date and asked if another date would be available. There were no other dates currently but LA would keep this under review. It would be a good idea to offer other dates as I for one am interested.
4	anonymous	More visibility in the LA education bulletins. Only aware of Schools Forum due to the proactivity of Mel Penney in Primary Head's Forum meetings. De-delegation of funds to the NEU was unanimously voted against by headteachers, yet appears to be pushed unfairly. Increased transparency about how to find out about agenda items in advance.
5	anonymous	We do rely on feedback from school forum members in our meetings and I have confidence in them as governors and know they will let us know about things that concern us but I don't know how people join the the forum or who appoints them. I didn't know the minutes were available to us or the agenda? If we had things we wanted people to raise.
6	anonymous	N/A
7	anonymous	As a new Chair of Governors I have never received any information about Hillingdon Schools Forum
8	anonymous	Hello Tony, it's only because I'm on Schools Forum that I'm able to ask most of the questions positively - but it I wasn't then I would have answered all of them differently. I'm not sure that the communication to all Chairs is working well. How does this information get sent out to them? Is it directly via email? Without that, it worries me that decisions taken does may not reflect the will of those we represent. Thank you for your excellent leading of Schools Forum. Kind regards, Jo (Palmer)
9	anonymous	I am a governor of around 3 years but have only recently taken on the role of Chair. I don't know anything about the Schools Forum but now know of its existence I will research it.
10	anonymous	I hear feedback from this meeting at HASH meetings but it often is not specific. I know that we get sent emails about the Schools forum and sometimes minutes but as a busy headteacher I need a much more concise summary of what is on the
11	anonymous	It would also be helpful to see a headteacher or exec headteacher chair school forum for a change so it reflects the challenges headteachers face in managing budgets and operating schools.



	<b>London Borough of Hillingdon Schools Forum 5<sup>th</sup> December 2024</b>
<b>Title</b>	<b>DSG Budget Monitoring</b>
<b>Agenda Item</b>	<b>5b</b>
<b>Report by</b>	Andrew Good
<b>Appendices</b>	None
<b>Recommendation(s)</b>	<input checked="" type="checkbox"/> Information <input type="checkbox"/> Consultation <input type="checkbox"/> Decision

## 1 Introduction

- 1.1 This paper presents the period 6 budget monitoring position for the London Borough of Hillingdon.

## 2 Recommendation

- 2.1 Representatives of Schools Forum are invited to note the contents of this report.

## 3 Background

The budget monitoring position for the Dedicated Schools Grant (DSG) for the period ending September is presented below.

Dedicated Schools Grant (DSG) Blocks	Budget 2024/25			Forecast M6	Va
	DSG Settlement	Academy Recoupment	LBH Maintained		
	£'000	£'000	£'000	£'000	
DSG Grant	-385,613	-184,904	-200,709	-200,709	
<b>Expenditure:</b>					
Schools Block	277,846	173,260	104,586	104,586	
Early Years Block	37,480		37,480	37,480	
Central Schools Block	2,429		2,429	2,429	
High Needs Block	67,858	11,644	56,214	73,465	1

The LA maintains detailed records of all existing placements and their costs along with detailed DSG cost centre forecasts. All High Needs Block (HNB) is included within a live financial tracker which is updated weekly and a cut is taken from this monthly to provide the above analysis. This is being automated currently into a Power BI Dashboard which will reduce the manual activity and allow us to provide significantly increased detail and granularity for the service and School Forum which is expected to be finalised for April 2025.

There are a number of significant pressures which are affecting all LAs around the High Needs Block and Hillingdon is no exception to this. Identified below is what we are working on to minimise the costs to the High Needs Block:

- continued increases in the identification of children with SEN needs which results in a steady increase in EHCP – Hillingdon is making significant progress in lowering the growth in EHCPs through early intervention;
- on-going increases in the costs of Independent provision – we are working with procurement and commissioning colleagues to minimise these increases where possible;
- increasing our own capacity of SEN places both in special schools and within specialist units within mainstream schools both of which can provide high quality provision in a more cost effective manner;
- identify and implement a fair approach to banding which align the financial costs of provision to the delivery costs with our schools.

These and a number of other actions are a significant part of our Safety Valve projections. The financial tracker mentioned earlier has shown a £380k improvement from month 6 to 7 in the forecast relating primarily to a reduction in the costs of independent placements.

#### 4 Impact of the Proposal

The content and presentation of this report is an initial position – comments are welcome on the format and level of detail that is presented for future reports.



**London Borough of Hillingdon  
Schools Forum  
5 December 2024**

<b>Title</b>	<b>Banding Review Working Group / Special School Descriptor Project Update Report</b>
<b>Agenda Item</b>	<b>5c</b>
<b>Report by</b>	Helen Redding
<b>Appendices</b>	n/a
<b>Recommendation(s)</b>	<input checked="" type="checkbox"/> Information <input type="checkbox"/> Consultation <input type="checkbox"/> Decision

**1. Purpose:**

To provide Schools Forum with an update on the banding review project.

**1. Project Aims**

To ensure that there is a fair, transparent and effective funding system that supports:

- the right provision / support being in place at the right time as locally as possible linked to evidenced needs;
- identifying and sharing best practice and enabling it to become common practice;
- improved parent / carer confidence in Hillingdon's local provision.
- Efficient and effective use of funding / resources.

**2 Intended Outcomes**

Supporting and informing:

- a shared understanding of the range and levels of needs across Hillingdon schools and how that compares with other areas.
- a transparent and equitable system of resource allocation across Hillingdon with clear co-produced matrices of need, provision and then matching this to funding.
- identification of potential changes to the current system.
- informing improvement in the quality and clarity of advices and EHCPs.
- evidencing the impact of resourcing on children and young people's outcomes.

**3. Development of Mainstream Descriptors Framework and SEND Funding Guidance**

- A working group consisting of representatives from all phases of school as well as officers have been meeting monthly since November 2023 to identify what needs to be done and to progress the work.
- The working group took on board feedback throughout the development phase and used this to inform the framework.
- The working group felt that there needed to be clearer guidance for schools on funding to support SEND in the delegated budget, including the notional SEND budget. We co-developed a guide for schools regarding SEND Funding, shared it with SENDCo Forums for feedback and amended it accordingly. This was circulated to schools in September 2024.
- We reviewed a range of other LA SEND funding models and agreed which elements we wanted included in a Hillingdon model.
- We used this to develop the Hillingdon framework initial section. We shared this through SENDCo

Forums to get further feedback and amended accordingly.

- Representative schools and SEND officers tested EHCPs / Annual Reviews against the group's preferred needs descriptor example and identified strengths and gaps.
  - We developed Hillingdon's needs descriptors from this and schools and SEND Officers tested them again (June).
  - We found that the Annual Review was important to support identifying a descriptor where the EHCP was older and had not been amended recently.
  - Learning from this is informing improvements in the EHCP quality and Annual Review processes.
  - We had input from therapists and agreed amendments with them.
  - The descriptor framework was used to inform calculation of banding values (funding methodology is included in the framework).
  - To address feedback on TA hourly rates in the current funding model we used the current NJC rates for TAs as a starting point for modelling.
- 
- We applied on-costs to the rate and then applied ratios to the figures to reflect the different mix of support for pupils meeting each descriptor. In doing this we reflected that Enhanced 1 was broad, depending on the impact of anxiety and emotional needs on support. We therefore applied two levels of funding to this descriptor to reflect this.
  - We have discussed this with schools and think it would be helpful if we split this descriptor into two to reflect the differences.
  - The pupils that meet the admissions guidance for a specialist place are currently included as 'exceptional' in the framework until we complete the special school work. We will then add a section to reflect the funding methodology for this group of pupils linked to the special school descriptors.
  - We are following a phased implementation plan to ensure that the new system is implemented smoothly and without creating additional pressure for schools.
  - The working group agreed that the ESF (pre EHCP) framework needs to align with the Banding Framework so a placeholder has been added to the framework.
  - The final document was shared with schools in September 2024.
  - We have run 5 workshops across the Borough to support schools in understanding the framework. We have another secondary workshop planned for December. These have been attended by about half of schools, and some schools sent more than one person.
  - We have taken the feedback from this to inform proposals to support implementation. We are developing a guide for SENDCos to support them in knowing what information to provide. We have asked schools to feedback on what additional support they would like. Although the Autumn workshops were attended by some heads, heads that attended reported that they had found them very helpful and suggested that we offer a workshop for heads. The working group reps will suggest this to Primary Heads Forum and if agreed we will offer this in the Spring term.
  - We will continue to keep the framework under review as we implement it so that we take any learning from its implementation and amend it if needed. The working group are reflecting on learning from implementation on a monthly basis to inform further framework and system improvement actions. We will formally review it at the end of the academic year.
  - Using the learning from the school framework, we will review how this would apply to early years and FE settings.
  - The working group are now focusing on the element of the framework for Early Support Funding. A proposal was taken to the working group on November 28<sup>th</sup> and is being amended. It will then be shared with schools.

#### 4. Special School Project

- Helen Redding visited all special schools to discuss the project with school leaders, understand the pupil profile of the schools and agree a way forward.
- We worked with special school leaders from The Pride Academy, Eden Academy Trust, Meadow High and Hedgewood Primary School to review descriptors from other LAs taking account of reflections from visits to Hillingdon Special schools and discussions with school leaders.
- Using the feedback, we developed a draft Hillingdon model which was then shared with all schools for comment and suggestions.
- Special school leaders from Hedgewood, Meadow and Eden Trust schools met in July to test the descriptors against some of their pupils. This was a helpful session and helped support a shared understanding of needs and levels of support.
- Therapists reviewed the framework and made some suggestions which were incorporated.

- We met with The Pride Academy on 5<sup>th</sup> September to go through the special school descriptors and the implementation framework. Helen Redding worked with the school in early October to further develop the SEMH descriptors. The head is involved in joint moderation with other schools.
- Other than the initial visit, The Willows has not responded to invitations to engage.
- A moderation session was set up for each participating school in the first half of the Autumn to test their allocation of descriptors against the framework. Schools provided feedback which was incorporated into the updated version.
- Schools have identified a descriptor for all of their current pupils and moderation with schools is happening at the moment (Nov/Dec).
- Based on this we will work on the funding modelling which will be discussed with schools.
- We will base 25/26 budgets on the pupils at the schools as at January census 2025.
- The implementation framework has been kept under review and amended.

## **5. Risks, Issues and Challenges**

*Report on any issues or problems that have impacted on development and implementation.*

The working group representatives believe that there are misunderstandings about the work and recommends that data and information on implementation and the banding profile is shared regularly with schools using existing communication mechanisms to support knowledge and understanding.

The working group are concerned about the knowledge and understanding of the schools that have not engaged in the workshops / do not engage in other Forums.

The working group is concerned about ensuring that we continue to plan CPD for future leaders / SENDCos that have not been part of the work to date. The working group recommends continued CPD on the framework, and that this is built into SENDCO and Headteacher / leadership induction.

We continue to recognise that the other system improvement pieces of work, particularly around ensuring consistent quality of practice at SEND Support, quality of EHCP advice and plans and quality of Annual Reviews must be driven to support implementation.