



SCHOOLS FORUM

NOTICE AND AGENDA

Date: Tuesday, 15 October, 2024

Time: 6.30 pm

Venue: Cheam High School, Chatsworth Road, Cheam, Sutton SM3 8PW

Enquiries: Matthew Stickley, londongovernanceltd@gmail.com

To all members of the School Forum:-

Member	Role
Academy Representation (A)	
Bec Allott	Academy Secondary Headteacher
Jamie Bean	Academy Secondary School
VACANCY	Academy Secondary Headteacher
Ben Cloves	Academy Secondary Headteacher
Peter Naudi	Academy Secondary Headteacher
Phillip Hedger	Academy Primary Headteacher
Sharon Roberts	Academy Primary Headteacher
James Kearns	Academy Special School Headteacher
VACANCY	Academy Primary Governor
Emma Bradshaw	Academy Pupil Referral Unit (shared)

Maintained School Representation (B)	
Jenny Sims	Chair; Maintained Primary School Governor
Robert Claxton	Maintained Primary School Headteacher
Emma Walford	Maintained Nursery School Headteacher
Bev Williamson	Sutton Tuition and Reintegration Service (shared)

Other Representation (C)	
Vicki Bell	Early Years Provider
Jason Pemberton-Billing	14-19 Provider
Sue Smith	Sutton Teachers Committee
Andrew Theobald	Vice Chair; Archdiocese of Southwark; Maintained Secondary School Governor
VACANCY	Diocese of Southwark

Observers (D)	
Councillor Rob Beck	Vice Chair of the People Committee
Councillor Jane Pascoe	Opposition Spokesperson for the People Committee

1. **Welcome and Introductions**
2. **Apologies for Absence**
3. **Declarations of Interest**

Standing Declarations

Declarations of interest which are made by members and officers of the Schools Forum which are not interests created by virtue of the role that member/officer holds.

Members

Bec Allott – Non-Executive Director of Cognus LATC
 Jenny Sims – Non-Executive Director of Cognus LATC
 Sharon Roberts – Trustee of Cheam Academies Network Trust
 Peter Naudi – Vice Chair of Limes Governing Boady, Chair of Vulnerable Pupils Panel

Officers

Kieran Holliday – Non-Executive Director of Cognus LATC

4.	Minutes of the Previous Meeting	5 – 10
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6.	Free School Meals for pupils attending education otherwise than at school and Pupil Premium funding for independent provision	33 – 36
7.	SEND Transformation / Education Operational Group Update	37 – 46
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PRESENT:

1. Jenny Sims (Chair)
2. Bev Williamson
3. Sharon Roberts
4. James Kearns
5. Pete Naudi
6. Sue Smith
7. Bec Allott
8. Emma Walford
9. Emma Bradshaw
10. Ben Cloves
11. Alison Day

1: Welcome and Introductions

The Chair, Jenny Sims, welcomed those present.

2: Apologies for Absence

Apologies for absence were received from Jamie Bean, Andrew Theobald, Robert Claxton, Vicki Bell, James Fisher, and Councillor Jane Pascoe.

Apologies for absence were also received from Philip Hedger for whom Alison Day attended as a substitute.

Apologies for lateness were received from Alison Day.

The Chair noted that James Fisher had advised that he would be stepping down from the Forum from the next school year. The Chair thanked James Fisher on behalf of the Schools Forum for his contributions during his tenure and wished him well in the future.

3: Declarations of Interest

The Forum noted that Jenny Sims and Bec Allott, members, and Kieran Holliday, an officer, were non-executive directors of Cognus LATC.

In respect of item 10, Bev Williamson declared that she was headteacher of Sutton Tuition and Reintegration Services (STARS).

Sharon Roberts declared that she had been involved in conversations around item 10 - Split Site Funding Policy.

4: Minutes of the previous meeting

In response to a question, the Clerk confirmed that a wet signature was not a requirement for Schools Forum minutes but that the records of minutes being submitted to and approved by the Forum were publicly available on the council's website.

RESOLVED: That the minutes of the previous meeting held on 20 February 2024 be agreed as an accurate record.

5: Revenue Report

The Strategic Finance Business Partner introduced the report.

The Forum discussed how the London Borough of Sutton's non-maintained independent spend compared with other London Boroughs. Officers confirmed that Sutton's spend, although high, was comparatively value for money and that other boroughs' spends in this area were significantly higher.

RESOLVED:

1. To note the outturn position on the DSG for 2023/24.
2. To note the deficit balance of £1.391m to be carried forward to 2024/25.
3. To note and approve the latest budget for 2024/25.
4. To note the latest outturn position for 2024/25, as at month 2 (May 2024).
5. To approve updates to the Scheme for Financing Schools 2024-25.

6: DSG Management Plan - Baseline Position

The Acting Strategic Lead for Education introduced the report.

The Forum noted that the £7m deficit projection for the 2024/25 year would likely increase in future but that the local authority was convening an Educational Operational Group to prepare and deliver a Dedicated Schools Grant Management Plan which would improve the financial projections of the Dedicated Schools Grant account.

RESOLVED:

1. To note the appointment of a SEND transformation team in the local area that will be responsible for developing and implementing a DSG management plan over the next two years.

7: Growth Funding Policy Review

The Acting Strategic Lead for Education introduced the report.

The Forum noted its previous decisions as regards growth funding and that the local area policy for growth funding of schools was contingent upon the expansion being a permanent change in a published admission number rather than a one-off bulge class year, but that schools had entered into memoranda of understanding with the local authority based on a multi-year funding offer.

The Forum noted that growth funding would reduce each year such that the 2025-26 school year would be the final year through which growth funding would be provided; as from that point onwards the additional pupils would be accounted for within permanent school places.

The Forum discussed the options available with respect to payments which had been made beyond the growth policy.

RESOLVED:

1. To agree to adopt the national minimum payments for growth funding from April 2024 as set out in paragraphs 3.2 - 3.4.
2. To agree that in relation to the payment of growth funding to secondary schools that have taken additional pupils from 2021, to accept the error in relation to the Memoranda of Understanding for secondary schools and stick with one year payments to secondary schools in line with the Growth Policy agreed by Schools Forum at the time.

8: Sutton Tuition and Reintegration Service (STARS) Review

The Acting Strategic Lead for Education introduced the report.

Officers confirmed that the significant majority of pupils who were registered with STARS were legitimate placements but that schools were expected to meet the costs of students being placed within the STARS unit. It was confirmed that the majority of current students placed within STARS were on short-term referrals.

Officers confirmed that the permanent schools of placed students have been advised that costs of long-term placements will be required from the parent schools from September 2024 on a pro rata of the £6,533 per annum cost of placement.

The Forum discussed the challenges for parent schools which still had to meet the costs of providing a mainstream place for a pupil referred to STARS whilst also meeting the cost of the pupil being placed within STARS.

The Forum noted that the 12-week placement and reintegration package was ambitious but that this was intended to return STARS to its original purpose of being a place for unwell students to attend in lieu of mainstream school with the clear intention that they would return to mainstream education when appropriate. The Forum discussed the need for a plan for pupils who were not able to return to their parent schools after the 12-week period.

RESOLVED: To note the intention (as set out in Appendix A) to:

1. Implement the introduction of redirected funding from schools for placements at STARS from September 2024.
2. Use the redirected funds to support the creation of a new Family Support Service and transport arrangements.
3. Review the impact of these arrangements in July 2025.

9: Developing Vocational Provision at Sunningdale Road

The Acting Head of Pupil Based Commissioning introduced the report.

The Forum discussed the risk of Limes being required to pay market value rent of approximately £40,000 per annum for the site but that a nil rate lease agreement was being sought.

In response to questions, officers confirmed that headteachers who supported this provision had agreed, subject to the agreement of the Schools Forum, to buy placements and to transfer them between schools through the year to meet demand, and that the provision had been well-received by schools. It was further confirmed that a decision on the use of the Sunningdale Road site was expected from the Local Planning Authority by 23 August 2024 with the intention to open the site by January 2025.

The Forum discussed the need for an update to be provided to the Forum in the new year on the progress on opening the site and the take up of places. An amendment to the recommendations to this effect was moved by Bec Allott, seconded by Jenny Sims, and agreed by the Forum.

RESOLVED:

1. To agree the principle that the LA funds from the HN block place funding for 20 places (£200,000) to provide the vocational offer at Sunningdale road (via Limes), from January 2025).
2. To agree the principle that top-up funding is provided by schools via an agreed schedule, to be invoiced via the Limes College. The top up rate to be set at £6,500 for 24/25, and schools be invited to commission places at the start of the year with payments made up front by each school, for the following academic year (Option 3).
3. To agree that an update be provided to the Schools Forum in early 2025 on the arrangements for opening the site and the number of places taken up by schools.

10: Split Site Funding Policy

The Acting Head of Pupil Based Commissioning introduced the report.

The Forum discussed whether split-site placements would be considered as mainstream placements by the Department for Education. Following this discussion, an amendment to the recommendations was moved to insert a recommendation setting out the Schools Forum's understanding of the matter.

RESOLVED:

1. To note that split site payments have been made to mainstream schools in 2024/25 based on the National Funding Formula (and will be thereafter).
2. To agree that the local split site policy as set out in paragraph 3.4 is discontinued with effect from 2025/26.
3. To note that where specialist provision is delivered from a split site, any additional operational costs for special and AP schools, and specialist bases, will be considered as part of agreements on the value of top-up funding rates and through the annual place change notification process.
4. As such, a separate split site funding payment will not be paid out to special schools or specially resourced provision from 2024-25.
5. To agree that the Schools Forum recognises that a mainstream school operating a split site specially resourced provision should be eligible for split site funding through the National Funding Formula, for the following reasons:
 - a. The school's Unique Reference Number will continue to state that the school's provision is mainstream education;

- b. Pupils based within split sites will be part of the same school community and included in the school performance measures; and
- c. Placements of students with Education, Health and Care Plans are within the school and a tribunal would be likely to consider said pupils to be part of the main school and not a separate establishment.

11: Homes for Ukraine Funding Update

The Acting Strategic Lead for Education introduced the report.

RESOLVED: to note the report.

12: Capital Update

The Acting Strategic Lead for Education introduced the report.

RESOLVED:

1. To note the summary of developments against the primary, secondary and special expansion programmes.
2. To note the confirmed capital maintenance programme for 2024/25.
3. To note the approved programme of Special Provision Capital Fund (SPCF) projects to date, including the most recent Spring 2024 allocation round.

13: Schools Forum Meeting Dates 2024-28

The Clerk introduced the report.

RESOLVED: To agree to the schedule of meeting dates at Appendix A.

The meeting ended at 19:55.

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Report Title	Revenue Report
Meeting	Schools Forum
Date	15 October 2024
Chair	Jenny Sims
Report Author(s)	Carol Worne, Strategic Finance Business Partner, Sutton Council Jack Cutler, Acting Head of Pupil Based Commissioning
Open/Exempt	Open

1. Summary

- 1.1. This report provides an update on the Dedicated Schools Grant (DSG) since the last meeting of the Forum.

2. Recommendation(s)

- 2.1. To note the latest position on the DSG for 2024/25, as at September - Month 6 (Appendix A)
- 2.2. To note and agree the special schools allocation of Core Schools Budget Grant 2024/25 (Appendix B).
- 2.3. To note the S251 Budget Statements - LA Budget Table, Early Years Funding and High Needs Places Table (Appendices C, D and E).

3. Background

- 3.1. Spending decisions on the DSG were agreed by the Schools Forum in February 2024 for the financial year 2024/25. This report refers to issues that have arisen since the last meeting on 9th July 2024 and provides details of the latest DSG budget for 2024/25.

4. DSG Budget 2024/25

- 4.1. The latest DSG allocation for 2024/25 is £137.225m, after recoupment for academies (£149.514m), high needs place funding provision (£8.282m) and centralised NNDR (£1.749m).
- 4.2. Please find attached, at Appendix A, a breakdown of the DSG budget for 2024/25 and the variance as at September 2024 (month 6). The highlighted areas in the high needs block indicate the SEN budget.

- 4.3. The DSG is currently forecasting an in-year £8.641m overspend at month 6. £64k is Schools Block and relates to lagged growth funding for secondary schools. £163k is in the CSSB and relates to underfunded historic commitments, £8.414m is in the High Needs Block
- 4.4. The cumulative DSG deficit at 1/4/24 was £1.391m, therefore, the forecast closing cumulative deficit is £10.032m.

High Needs Block

- 4.5. The High Needs Block budget was presented as two drafts at the start of the year, one including forecast growth (growth budget) and one based on previous year outturn only (no growth budget). Due to the level of funding received, it was not possible to set a budget including predicted growth, so the overspends being reported have elements of expected and unexpected overspends.
- 4.6. Of the total £8.414m forecast overspend, £6.86m was predicted at the start of the year, and £1.55m is over and above what was expected, in the following spend categories:
- Bases and Special Schools - £0.96m
 - Non-maintained, In dependent and Other Local Authorities - £0.81m
- 4.7. The increasing forecasts in these areas is due to increased costs as a result of EHCP reviews, an increased number of placements in the independent sector and the rising number of EHCPs:
- April 2024 - 2,410
 - September - 2,585
- This represents an average monthly increase of 29. At the time of setting the draft budget the predicted increase was an average of 25 per month.
- 4.8. Local Authorities are expected to actively manage deficits in the DSG and to ensure that funding is used appropriately and efficiently. The Council's 'Ambitious for SEND' programme has identified a number of key strategic work streams that are underway and are focussed on ensuring that the funding available is targeted to need as closely as possible.

Core Schools Budget Grant 2024/25

- 4.9. The DfE is providing £1.1 billion to support schools with overall costs, including the 2024 teacher pay award and support staff pay offer 2024/25, to cover the period September 2024 to March 2025. This funding will be incorporated into the core budget from April 2025.
- 4.10. The grant will be paid out to mainstream schools in one payment, in November for LA maintained schools and in December for academies. The rates are:

	National Rate £	ACA	Sutton Rate after ACA £
Basic per-pupil rate - primary pupils, including pupils in reception	76.00	1.100459	83.63
Basic per-pupil rate - key stage 3 pupils	108.00	1.100459	118.85
Basic per-pupil rate - key stage 4 pupils	122.00	1.100459	134.26
Lump sum	2,900.00	1.100459	3,191.33
FSM6 per-pupil rate - eligible primary pupil	70.00	1.100459	77.03
FSM6 per-pupil rate - eligible secondary pupil	100	1.100459	110.05

- 4.11. Special schools will receive two payments, the first payment will be based on place numbers as at July 2024, with a second allocation using the updated place numbers in March 2025.
- 4.12. Sutton proposes to pass on allocations to LA and academy specials schools as per the calculation provided by the DfE, which is £610 per place plus the Area Cost Adjustment (1.114626) = £679.92 per place (see Appendix B).

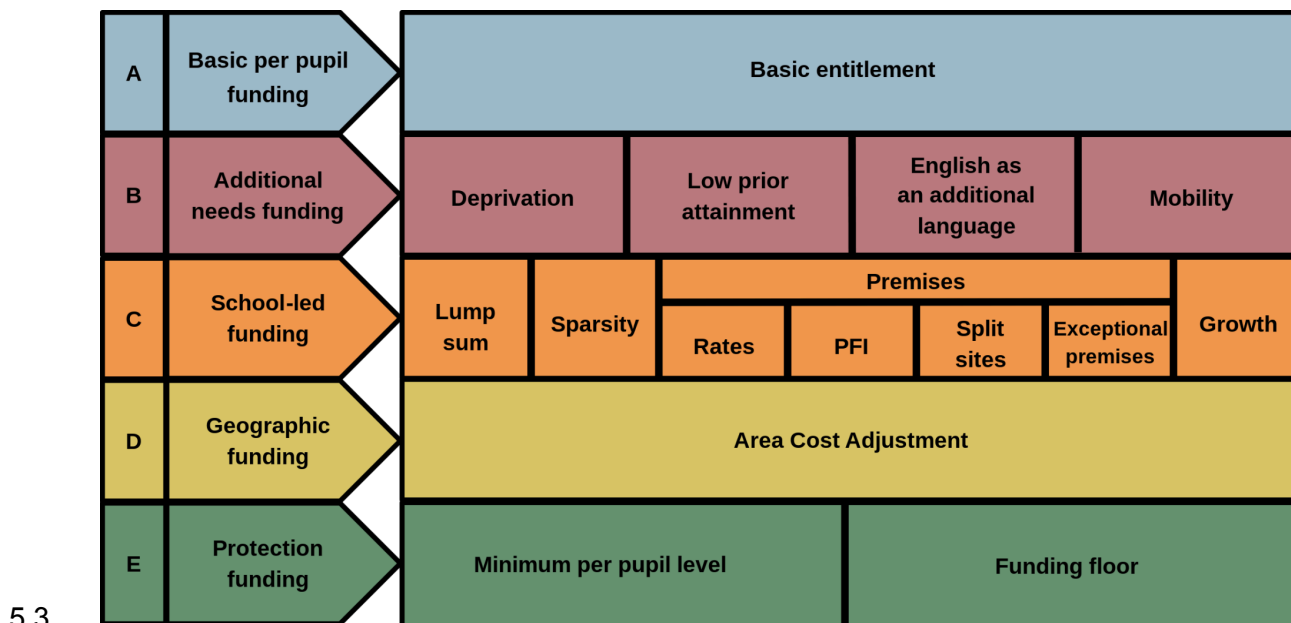
Financial Implications

- 4.13. This report highlights DSG issues that have arisen since the last meeting of the Forum.

5. DSG Funding 2025/26

National Funding Formula 2025/26

- 5.1. Due to the change of government there has been a delay in the publication of National Funding Formula factor values for 2025/26. It is expected that these will be published as soon as possible after the budget announcement on 30th October. The Dedicated Schools Grant allocations will be published in December 2024.
- 5.2. It has been confirmed that NFF Funding Factors for mainstream schools will be the same as the 2024-25 NFF.



Local Factors 2025/26

- 5.4. As for 2024/25, a request will be made to transfer 0.5% of the Schools Block funding allocation to the High Needs Block, please refer to separate paper being presented.
- 5.5. A disapplication request is also being considered for an Exceptional Premises Factor, relating to Nonsuch Primary School rent. The school has foundation status and is positioned on Surrey land. There is currently no valid lease as the previous one, between Surrey and Sutton (before the school acquired foundation status) expired in May 2021.
- 5.6. Surrey is now renegotiating a new lease, which will be between Surrey and the school, but as the funding authority we will require the rental value to be added to our funding allocation, as exceptional funding, so we can then allocate the funding to the school, who in turn will pay Surrey.
- 5.7. It is not certain at this stage whether the disapplication will be granted, if it isn't granted then the school will be liable for the rental charge. We do not expect to fund this additional cost to the school from the Schools Block, without disapplication approval.

6. S251 Budget Report

- 6.1. The S251 budget report has been approved by the DfE and will be published on the Sutton website. Please refer to Appendices C, D and E for more detail. Appendix C is the summary of budgeted income and expenditure across the DSG, Education Services included in the Sutton General Fund (e.g. Assisted Travel) and Children's Services. Appendix D provides a breakdown of Early Years funding arrangements and Appendix E provides further details of Local Authority maintained High Needs settings.

7. Influence on the Council's Corporate Core Values and Objectives

- 7.1. One of the core values is partnership working. Setting the budget for the Dedicated Schools Grant, and considering related issues, is an important part of the budget process that fully involves schools as partners and particularly recognises the important role of the Schools' Forum.

8. Appendices

Appendix Letter	Appendix Title
A	DSG latest budget position 2024/25 – month 6
B	Core Schools Budget Grant - Special Schools
C	S251 Budget Table Report 2024/25
D	S251 Budget Early Years Funding Table Report 2024/25
E	S251 High Needs Places Table Report 2024/25

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Appendix B- Revenue Report 20241015 - DSG 2024/25 Budget Summary - Month 06

Description	Draft Budget No Growth £	Latest Budget £	M06 Forecast £	M06 Variance £	Commentary
Schools Block					
Primary Maintained Funding	40,507,700	40,507,700	40,467,800	(39,900)	Core funding for maintained primary schools (NFF)
Secondary Maintained Funding	14,333,200	14,333,200	14,322,300	(10,900)	Core funding for maintained secondary schools (NFF)
De-delegation	(50,800)	(50,800)		50,800	Growth funding relating to primary schools
Primary Growth	24,100	24,100	24,100	0	Growth funding relating to primary schools
Secondary Growth	647,100	647,100	711,200	64,100	Growth funding relating to secondary schools and Unplaced Year 11 Funding
Total - Schools Block	55,461,300	55,461,300	55,525,400	64,100	
Central School Services Block					
Historic Commitments					
Contribution to combined budgets	15,000	15,000	15,000	0	Contribution to LSCP
Early Retirement Costs (pensions)	530,500	367,000	530,500	163,500	Costs of school staff that retired early (historical)
Depreciation of non current assets	218,200	218,200	218,200	0	Borrowing re: Opportunity Bases in 2012
Ongoing Functions					
Admissions Services	386,100	386,100	386,100	0	Costs of the schools admission service (Cognus)
Schools Forum Costs	16,000	16,000	16,000	0	Costs of Schools Forum including meetings, staffing support etc...
Independent School Fees (non SEN)	150,000	150,000	150,000	0	Contributions to fees for LAC pupils attending independent schools
Copyright Licenses	205,700	234,800	234,800	0	Fees set by Copyright Licensing Authority for all schools (paid centrally)
DSG Contribution to LBS Central Provision	619,200	619,200	619,200	0	Contribution from the DSG to support central provision in the LA
Total - CSSB	2,140,700	2,006,300	2,169,800	163,500	Historic Commitments Allocation £509k, total costs £749k
High Needs					
Early Years - Place	191,000	191,000	191,000	0	Lump sum paid to Thomas Wall for Dragonflies base
Early Years - Top Up	250,000	250,000	265,000	15,000	Top up Individual
Portage Service	252,800	252,800	252,800	0	Playwise Service (a CIC) who provide portage (home-visiting educational services) for pre-school children with SEND and their families.
Autism Parenting Support Officer	37,500	37,500	37,500	0	2 year contract
Primary mainstream	4,150,000	4,150,000	4,723,900	573,900	Top up for individual pupils (legacy) and additional support contracts
Primary Bases Maintained - Place	564,000	564,000	564,000	0	Place funding for maintained opportunity bases
Primary Base - All Schools	3,350,000	3,350,000	3,793,000	443,000	Additional Place and top up funding for maintained and academy opportunity bases
Primary - OLA	550,000	550,000	588,200	38,200	Top-up funding for Sutton pupils in OLA schools
Secondary Mainstream	1,630,000	1,630,000	1,917,000	287,000	Top up for individual pupils (legacy) and additional support contracts
Secondary Bases - Place and Top Up	1,140,000	1,108,600	1,141,000	32,400	Additional Place and top up funding for maintained and academy opportunity bases
Secondary - OLA	450,000	450,000	349,000	(101,000)	Top-up funding for Sutton pupils in OLA schools

Appendix B- Revenue Report 20241015 - DSG 2024/25 Budget Summary - Month 06

Description	Draft Budget No Growth £	Latest Budget £	M06 Forecast £	M06 Variance £	Commentary
Special Schools - Maintained - (Sherwood) Place	2,034,500	2,034,500	2,034,500	0	Place and pay and pension grant funding
Special Schools - Maintained - (Sherwood) Top Up	4,670,000	4,670,000	7,287,400	2,617,400	Top up and top up individual funding plus backdated underfunding from previous years (agreed with Schools Forum)
Special Schools - Academies - Pension	384,300	384,300	384,300	0	Pay and pension grant funding
Special Schools - Academies	5,720,000	5,720,000	6,136,800	416,800	Top up, top up individual and place extra funding
Special Schools - OLA	2,500,000	2,500,000	2,980,000	480,000	Top-up funding for Sutton pupils in OLA schools
Non maintained Independent Provision	8,770,000	8,770,000	11,747,000	2,977,000	Non maintained or independent fees - including specialist and AP provision and tuition
Independent Tutoring Fees	1,385,000	1,385,000	1,460,000	75,000	Fees paid for Independent Tutoring Services
Alternative Provision - (Limes) Place	1,741,700	1,516,900	1,864,300	347,400	Place, additional place, top up and pay and pension grant funding
Alternative Provision - (Limes) Additional Place	116,700	0	0	0	
Alternative Provision - (Limes) Individual	854,000	854,000	854,000	0	Top up Individual
Alternative Provision - (STARS) Place	1,283,800	1,283,800	1,283,800	0	Place, top up and pay and pension grant funding
Alternative Provision - (STARS) Individual	92,600	92,600	92,600	0	Top up Individual
Hospital Provision - (STARS)	281,500	281,500	281,500	0	Lump sum paid to STARS for children educated in hospital
Schools Team (TYS)	110,000	110,000	110,000	0	Exclusions Prevention
Mainstream College	1,150,000	1,150,000	1,184,500	34,500	Placement costs related to mainstream college placements for pupils with an EHCP
Specialist College	2,500,000	2,500,000	2,695,000	195,000	Placement costs related to specialist college placements for pupils with an EHCP
Therapies (Cognus)	3,624,500	3,624,500	3,624,500	0	Therapies provided to individual pupils (mainstream/base/special schools) by Cognus
Therapies (Non-Cognus)	270,000	270,000	252,000	(18,000)	Therapies provided to individual pupils (mainstream/base/special schools) by other suppliers
SEN Travel Assistance	690,000	640,000	640,000	0	Contribution to SEN transport including travel training
Social Worker Support for Education	186,000	0	0	0	Removed from DSG budget
Graduated Response Funding (Clusters)	429,800	429,800	429,800	0	SenCo Salary costs, Cluster payments and Backfill payments
Other Expenses	85,000	85,000	85,000	0	Cognus Commissioning Agreement
Cognus Ltd - High Needs Services	2,026,100	2,026,100	2,026,100	0	
Total - High Needs Block	53,470,800	52,861,900	61,275,500	8,413,600	
Early Years Block					
Early Years - 3 & 4 Year olds	26,861,100	15,737,300	15,737,300	0	Core funding to schools, PVI, nurseries to deliver 3 & 4 yr old free entitlement (EY NFF)
Early Years - 2 Year olds		6,355,200	6,355,200	0	Core funding to schools, PVI, nurseries to deliver 2 yr old free entitlement (EY NFF)
Early Years - Under 2 year olds		3,429,100	3,429,100	0	Core funding to schools, PVI, nurseries to deliver 9mth to 2 yr old free entitlement (EY NFF)

Appendix B- Revenue Report 20241015 - DSG 2024/25 Budget Summary - Month 06

Description	Draft Budget No Growth £	Latest Budget £	M06 Forecast £	M06 Variance £	Commentary
Early Years - Central Expenses		781,200	781,200	0	Central provision - EYFE Staffing and Predicable Needs funding
Cognus Ltd - Early Years Foundation		593,000	593,000	0	Central provision transferred to Cognus to provide EY advisory services
Total - Early Years	26,861,100	26,895,800	26,895,800	0	
TOTAL EXPENDITURE	137,933,900	137,225,300	145,866,500	8,641,200	
Total DSG Funding	(137,339,700)	(137,225,300)	(137,225,300)	0	
Total In Year Deficit	594,200	0	8,641,200	8,641,200	
DSG Reserve Deficit b/f			1,391,037		
DSG Forecast Year End Deficit (Unusable Reserve)			10,032,237		
SEN budget					

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Core schools budget grant (CSBG) allocations for September 2024 to March 2025 - places

School Name	ACA	Places	Per Pupil	Total per pupil £610 * 1.114626	Total	Rounded
Sherwood Park School	1.11462645	170	610.00	679.92	115,586.76	115,586.74
Sutton Tuition and Reintegration Service	1.11462645	75	610.00	679.92	50,994.16	50,994.15
Carew Academy	1.11462645	254	610.00	679.92	172,700.22	172,700.21
The Limes College	1.11462645	180	610.00	679.92	122,385.99	122,385.98
The Link School	1.11462645	152	610.00	679.92	103,348.17	103,348.16
Wandle Valley Academy	1.11462645	80	610.00	679.92	54,393.77	54,393.76
					619,409.07	619,409.00

619,409.00 Received

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EY Proforma Table: FUNDING PERIOD (2024-25)

Department for Education Section 251 Financial Data Collection

Report produced on 02/10/2024 12:27:04

Local Authority: 319 Sutton London Borough Council

														Pass-through rate for 3 & 4 year olds:		96.8%
														Pass-through rate for 2 year olds - Disadvantaged:		98.8%
														Pass-through rate for 2 year olds - Working Parents:		96.2%
														Pass-through rate for 9 month to 2 year olds - Working Parents:		97.3%
Row Heading	Description	Unit Value (£)			Unit Applied	Number of Units (Universal 15 hours)			Number of Units (Additional 15 hours)			Anticipated Budget (£)			TOTAL	
		PVI	Nursery School	Primary Nursery Class		PVI	Nursery School	Primary Nursery Class	PVI	Nursery School	Primary Nursery Class	PVI	Nursery School	Primary Nursery Class		
1. 3 & 4 Year Olds: Base Rate	Given to all settings who offer funded hours to eligible 3 and 4 year olds	£6.08	£6.08	£6.08	PerHour	837,197.89	77,715.00	657,091.00	492,636.97	28,026.00	194,060.00	£8,085,396	£642,905	£5,174,998	£13,903,299	
Row Heading	Description	Unit Value (£)			Unit Applied	Number of Units (Universal & Additional 15 hours)			Anticipated Budget (£)			TOTAL				
		PVI	Nursery School	Primary Nursery Class	Unit Type	PVI	Nursery School	Primary Nursery Class	PVI	Nursery School	Primary Nursery Class	PVI	Nursery School	Primary Nursery Class	TOTAL	
2a. 3 & 4 Year Olds: Supplements - Deprivation	Given to settings for children who are eligible for EYPP	£0.53	£0.53	£0.53	PerHour	85,239.99		9,779.00		53,910.00		£45,177	£5,183	£28,572	£78,932	
2b. 3 & 4 Year Olds: Supplements - Quality	Given to settings who have a EYP, EYTS or QTS working directly with children	£0.27	£0.27	£0.27	PerHour	479,521.00			28,026.00	851,151.00		£129,471	£7,567	£229,811	£366,848	
2c. 3 & 4 Year Olds: Supplements - Flexibility	Given to providers who offer funded hours flexibly	£0.25	£0.25	£0.25	PerHour	1,329,834.86			105,741.00	851,151.00		£332,459	£26,435	£212,788	£571,682	
2d. 3 & 4 Year Olds: Supplements - Rurality/Sparsity	No budget lines entered															
2e. 3 & 4 Year Olds: Supplements - EAL	No budget lines entered															
Funding provided through supplements:															6.8%	
3. 3 & 4 Year Olds: Maintained nursery school lump sums	Given to the maintained nursery schools		£454,701.00		LumpSum				1.00				£454,701		£454,701	
TOTAL FUNDING FOR EARLY YEARS SINGLE FUNDING FORMULA (3 & 4 YEAR OLDS):															£15,375,470	
4. 2 Year Olds - Disadvantaged: Base Rate	Given to all settings who offer funded hours to eligible 2 year olds	£9.22			PerHour	191,388.90						£1,764,606			£1,764,606	
5a. 2 Year Olds - Disadvantaged: Supplements - Deprivation	Given to settings for children who are eligible for EYPP	£0.53			PerHour	108,938.40						£57,737			£57,737	
5b. 2 Year Olds - Disadvantaged: Supplements - Quality	No budget lines entered															
5c. 2 Year Olds - Disadvantaged: Supplements - Flexibility	Given to providers who offer funded hours flexibly	£0.25			PerHour	191,388.90						£47,847			£47,847	
5d. 2 Year Olds - Disadvantaged: Supplements - Rurality/Sparsity	No budget lines entered															
5e. 2 Year Olds - Disadvantaged: Supplements - EAL	No budget lines entered															
Funding provided through supplements:															5.7%	
6. Total 'top-up' amount paid to individual providers to ensure the disadvantaged 2 year old																
TOTAL FUNDING FOR EARLY YEARS LOCAL FUNDING FORMULA (2 YEAR OLDS - DISADVANTAGED):															£1,870,196	
7. 2 Year Olds - Working Parents: Base Rate	Given to all settings who offer funded hours to eligible 2 year olds	£9.22			PerHour	435,690.90						£4,017,070			£4,017,070	
8a. 2 Year Olds - Working Parents: Supplements - Deprivation	Given to settings for children who are eligible for EYPP	£0.53			PerHour	108,938.40						£57,737			£57,737	
8b. 2 Year Olds - Working Parents: Supplements - Quality	No budget lines entered															
8c. 2 Year Olds - Working Parents: Supplements - Flexibility	Given to providers who offer funded hours flexibly	£0.25			PerHour	435,690.90						£108,923			£108,923	
8d. 2 Year Olds - Working Parents: Supplements - Rurality/Sparsity	No budget lines entered															
8e. 2 Year Olds - Working Parents: Supplements - EAL	No budget lines entered															
Funding provided through supplements:															4.0%	
TOTAL FUNDING FOR EARLY YEARS LOCAL FUNDING FORMULA (2 YEAR OLDS - WORKING PARENTS):															£4,183,730	
9. 9 Month to 2 Year Olds - Working Parents: Base Rate	Given to all settings who offer funded hours to eligible children aged 9 months to 2 years old	£12.66			PerHour	260,883.00						£3,302,779			£3,302,779	
10a. 9 Month to 2 Year Olds - Working Parents: Supplements - Deprivation	Given to settings for children who are eligible for EYPP	£0.53			PerHour	19,950.00						£10,574			£10,574	
10b. 9 Month to 2 Year Olds - Working Parents: Supplements - Quality	No budget lines entered															
10c. 9 Month to 2 Year Olds - Working Parents: Supplements - Flexibility	Given to providers who offer funded hours flexibly	£0.25			PerHour	260,883.00						£65,221			£65,221	
10d. 9 Month to 2 Year Olds - Working Parents: Supplements - Rurality/Sparsity	No budget lines entered															
10e. 9 Month to 2 Year Olds - Working Parents: Supplements - EAL	No budget lines entered															
Funding provided through supplements:															2.2%	
TOTAL FUNDING FOR LOCAL FUNDING FORMULA (9 MONTH TO 2 YEAR OLDS - WORKING PARENTS):															£3,378,573	

Row Heading	Description	Unit Value (£)			Unit Applied	Number of Units (Universal & Additional 15 hours)			Anticipated Budget (£)			
		PVI	Nursery School	Primary Nursery Class	Unit Type	PVI	Nursery School	Primary Nursery Class	PVI	Nursery School	Primary Nursery Class	TOTAL
11ai. SENIF (Funding paid directly to providers); 3 & 4 Year Olds - Funding allocated from EY	SENDIF Funding for eligible 3 and 4 year olds								£201,400			£201,400
11ai. SENIF (Funding paid directly to providers); 3 & 4 Year Olds - Funding allocated from HN	No budget lines entered											
11bi. SENIF (Funding paid directly to providers); 2 Year Olds - Disadvantaged - Funding	SENDIF Funding for eligible 2 year olds								£24,109			£24,109
11bi. SENIF (Funding paid directly to providers); 2 Year Olds - Disadvantaged - Funding	No budget lines entered											
11ci. SENIF (Funding paid directly to providers); 2 Year Olds - Working parents - Funding	SENDIF Funding for 2 year olds (eligible working parents)								£54,884			£54,884
11ci. SENIF (Funding paid directly to providers); 2 Year Olds - Working parents - Funding	No budget lines entered											
11di. SENIF (Funding paid directly to providers); 9 Month to 2 Year Olds - Working parents -	SENDIF Funding for eligible 9 month to 2 year olds								£37,812			£37,812
11di. SENIF (Funding paid directly to providers); 9 Month to 2 Year Olds - Working parents -	No budget lines entered											
TOTAL FUNDING FOR SEN INCLUSION FUND (TOP-UP GRANT ELEMENT):												£318,205
12a. Early years contingency funding: 3 & 4 Year Olds	Contingency funding for 3&4 YO											£211,500
12b. Early years contingency funding: 2 Year Olds - Disadvantaged	Contingency funding for 2YO Disadvantaged											£34,600
12c. Early years contingency funding: 2 Year Olds - Working parents	Contingency funding for 2YO Working											£34,600
12d. Early years contingency funding: 9 Month to 2 Year Olds - Working parents	Contingency funding for 9 mth to 2YO working											£103,800
13ai. Early years centrally retained funding: 3 & 4 Year Olds - SENIF	Targeted funded given to Setting to support children with higher levels of SEND who do not hold an EHCP.											£378,000
13ai. Early years centrally retained funding: 3 & 4 Year Olds - Other	Central salaries for LA costs of allocating funding and childcare sufficiency.											£114,156
13ai. Early years centrally retained funding: 3 & 4 Year Olds - Other	Allocation to Education Provider to support quality and SEND Support.											£373,590
13bi. Early years centrally retained funding: 2 Year Olds - Disadvantaged - SENIF	Targeted funded given to Setting to support children with higher levels of SEND who do not hold an EHCP											£48,000
13bi. Early years centrally retained funding: 2 Year Olds - Disadvantaged - Other	Central salaries for LA costs of allocating funding and childcare sufficiency											£14,496
13bi. Early years centrally retained funding: 2 Year Olds - Disadvantaged - Other	Allocation to Education Provider to support quality and SEND Support											£47,440
13ci. Early years centrally retained funding: 2 Year Olds - Working parents - SENIF	Targeted funded given to Setting to support children with higher levels of SEND who do not hold an EHCP											£102,000
13ci. Early years centrally retained funding: 2 Year Olds - Working parents - Other	Central salaries for LA costs of allocating funding and childcare sufficiency											£30,804
13ci. Early years centrally retained funding: 2 Year Olds - Working parents - Other	Allocation to Education Provider to support quality and SEND Support											£100,810
13di. Early years centrally retained funding: 9 Month to 2 Year Olds - Working parents - SENIF	Targeted funded given to Setting to support children with higher levels of SEND who do not hold an EHCP											£72,000
13di. Early years centrally retained funding: 9 Month to 2 Year Olds - Working parents - Other	Central salaries for LA costs of allocating funding and childcare sufficiency											£21,744
13di. Early years centrally retained funding: 9 Month to 2 Year Olds - Working parents - Other	Allocation to Education Provider to support quality and SEND Support											£71,160
TOTAL FUNDING FOR EARLY YEARS CENTRAL EXPENDITURE:												£1,758,700
14a. Early years pupil premium: 3 & 4 Year Olds												£66,000
14b. Early years pupil premium: 2 Year Olds - Disadvantaged												£17,950
14c. Early years pupil premium: 2 Year Olds - Working parents												£17,950
14d. Early years pupil premium: 9 Month to 2 Year Olds - Working parents												£1,800
15a. Disability access fund: 3 & 4 Year Olds												£106,500
15b. Disability access fund: 2 Year Olds - Disadvantaged												£14,100
15c. Disability access fund: 2 Year Olds - Working parents												£14,100
15d. Disability access fund: 9 Month to 2 Year Olds - Working parents												£10,900

Calculation of pass-through rate for 3 and 4 year olds

Calculation	Description	Amount
A	1. EYSFF (3 & 4 year olds) Base Rate(s) per hour, per provider type	£13,903,299
	2a. EYSFF (3 & 4 year olds) Supplements (supply a note for your supplement payment) - Deprivation	£78,932
	2b. EYSFF (3 & 4 year olds) Supplements (supply a note for your supplement payment) - Quality	£366,848
	2c. EYSFF (3 & 4 year olds) Supplements (supply a note for your supplement payment) - Flexibility	£571,682
	2d. EYSFF (3 & 4 year olds) Supplements (supply a note for supplement payment) - Ruralty/Sparsity	£0
	2e. EYSFF (3 & 4 year olds) Supplements (supply a note for your supplement payment) - EAL	£0
	3. EYSFF (3 & 4 year olds) Maintained nursery school (MNS) lump sums (if applicable)	£454,701
	11a (i) SEN Inclusion Fund - 3 & 4 Year Olds (Mandatory) - Funding allocated from EY Block	£201,400
	11a (ii) SEN Inclusion Fund - 3 & 4 Year Olds (Mandatory) - Funding allocated from HN Block	£0
	12a. Early years contingency funding - 3 & 4 Year Olds	£211,500
	Subtotal =	£15,788,363
	B	DfE quantum allocation to local authority of MNS supplementary funding (published in the DSG allocations tables)
C	Planned total base rate hours for universal 15 and additional 15 hours for 3 and 4 year olds (including hours through MNS)	2,286,727
D	Equivalent average rate to providers for three-and four-year old entitlement hours	£6.71
E	LA EY/NFF hourly rate for three-and four-year olds (published in the DSG allocations tables)	£6.93
F	Test of meeting requirement = (D / E) * 100%	96.8%

Calculation of pass-through rate for 2 year olds - Disadvantaged

Calculation	Description	Amount	
A	4. 2 year olds - Disadvantaged Base Rate(s) per hour, per provider type	£1,764,606	
	5a. 2 year olds - Disadvantaged Supplements - Deprivation	£57,737	
	5b. 2 year olds - Disadvantaged Supplements - Quality	£0	
	5c. 2 year olds - Disadvantaged Supplements - Flexibility	£47,847	
	5d. 2 year olds - Disadvantaged Supplements - Ruralty/Sparsity	£0	
	5e. 2 year olds - Disadvantaged Supplements - EAL	£0	
	11b (i) SEN Inclusion Fund - 2 Year Olds - Disadvantaged - Funding allocated from EY Block	£24,109	
	11b (ii) SEN Inclusion Fund - 2 Year Olds - Disadvantaged - Funding allocated from HN Block	£0	
	12b. Early years contingency funding - 2 Year Olds - Disadvantaged	£34,600	
	Subtotal =	£1,928,899	
	B	Planned total base rate hours for 2 year olds - Disadvantaged (including hours through MNS)	191,389
	C	Equivalent average rate to providers for 2 year old - Disadvantaged entitlement hours	£10.06
D	LA hourly rate for 2 year olds (published in the DSG allocations tables)	£10.20	
E	Test of meeting requirement	98.8%	

Calculation of pass-through rate for 2 year olds - Working parents

Calculation	Description	Amount	
A	7. 2 year olds - Working parents Base Rate(s) per hour, per provider type	£4,017,070	
	8a. 2 year olds - Working parents Supplements - Deprivation	£57,737	
	8b. 2 year olds - Working parents Supplements - Quality	£0	
	8c. 2 year olds - Working parents Supplements - Flexibility	£108,923	
	8d. 2 year olds - Working parents Supplements - Ruralty/Sparsity	£0	
	8e. 2 year olds - Working parents Supplements - EAL	£0	
	11c (i) SEN Inclusion Fund - 2 Year Olds - Working parents - Funding allocated from EY Block	£54,884	
	11c (ii) SEN Inclusion Fund - 2 Year Olds - Working parents - Funding allocated from HN Block	£0	
	12c. Early years contingency funding - 2 Year Olds - Working parents	£34,600	
	Subtotal =	£4,273,214	
	B	Planned total base rate hours for 2 year olds - Working parents (including hours through MNS)	435,691
	C	Equivalent average rate to providers for 2 year old - Working parents entitlement hours	£9.81
D	LA hourly rate for 2 year olds (published in the DSG allocations tables)	£10.20	
E	Test of meeting requirement	96.2%	

Calculation of pass-through rate for 9 month to 2 year olds - Working parents

Calculation	Description	Amount	
A	9. 9 month to 2 year olds - Working parents Base Rate(s) per hour, per provider type	£3,302,779	
	10a. 9 month to 2 year olds - Working parents Supplements - Deprivation	£10,574	
	10b. 9 month to 2 year olds - Working parents Supplements - Quality	£0	
	10c. 9 month to 2 year olds - Working parents Supplements - Flexibility	£65,221	
	10d. 9 month to 2 year olds - Working parents Supplements - Ruralty/Sparsity	£0	
	10e. 9 month to 2 year olds - Working parents Supplements - EAL	£0	
	11d (i) SEN Inclusion Fund - 9 month to 2 Year Olds - Working parents - Funding allocated from EY Block	£37,812	
	11d (ii) SEN Inclusion Fund - 9 month to 2 Year Olds - Working parents - Funding allocated from HN Block	£0	
	12d. Early years contingency funding - 9 month to 2 Year Olds - Working parents	£103,800	
	Subtotal =	£3,520,185	
	B	Planned total base rate hours for 9 month to 2 year olds - Working parents (including hours through MNS)	260,883
	C	Equivalent average rate to providers for 9 month to 2 year old - Working parents entitlement hours	£13.49
D	LA hourly rate for 9 month to 2 year olds (published in the DSG allocations tables)	£13.87	
E	Test of meeting requirement	97.3%	

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LA Table: FUNDING PERIOD (2024-25)

Department for Education Section 251 Financial Data Collection

Report produced on 02/10/2024 12:28:40

Local Authority: 319 Sutton London Borough Council

Description	Early Years	Primary	Secondary	SEN/ Special Schools	AP/ PRUs	Post School	Gross	Income	Net
1.0.1 Individual Schools Budget (before academy recoupment), including sixth form grant for maintained schools, but excluding high needs place funding	£25,659,500.00	£90,727,893.00	£118,181,446.00				£234,568,839.00		£234,568,839.00
1.0.2 High needs place funding within Individual Schools Budget (before academy recoupment), excluding funding for 16-19 academies and free schools and FE colleges and independent learning providers	£191,000.00	£1,647,500.00	£734,500.00	£6,719,530.00	£2,383,333.00		£11,675,863.00		£11,675,863.00
1.1.1 Contingencies		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.2 Behaviour support services		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.3 Support to UPEG and bilingual learners		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.4 Free school meals eligibility		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.5 Insurance		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.6 Museum and Library services		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.7 Licences/subscriptions		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.8 Staff costs – supply cover excluding cover for facility time		£0.00	£0.00				£0.00	£0.00	£0.00
1.1.9 Staff costs – supply cover for facility time		£0.00	£0.00				£0.00	£0.00	£0.00
1.2.1 Top-up funding – maintained schools	£250,000.00	£4,378,750.00	£467,750.00	£6,746,748.00	£626,441.00		£12,469,689.00	£0.00	£12,469,689.00
1.2.2 Top-up funding – academies, free schools and colleges	£0.00	£4,378,750.00	£3,295,750.00	£7,861,356.00	£2,718,588.00	£1,184,500.00	£19,438,944.00	£0.00	£19,438,944.00
1.2.3 Top-up and other funding – non-maintained and independent providers	£0.00	£0.00	£0.00	£12,675,500.00	£0.00	£2,500,000.00	£15,175,500.00	£0.00	£15,175,500.00
1.2.4 Additional high needs targeted funding for mainstream schools and academies	£0.00	£0.00	£0.00				£0.00	£0.00	£0.00
1.2.5 SEN support services	£38,669.00	£154,676.00	£154,676.00	£38,669.00	£0.00	£0.00	£386,690.00	£0.00	£386,690.00
1.2.6 Hospital education services				£0.00	£281,500.00		£281,500.00	£0.00	£281,500.00
1.2.7 Other alternative provision services	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
1.2.8 Support for inclusion	£290,300.00	£1,108,295.00	£1,155,895.00	£0.00	£0.00	£0.00	£2,554,490.00	£0.00	£2,554,490.00
1.2.9 Special schools and PRUs in financial difficulty				£0.00	£0.00		£0.00	£0.00	£0.00
1.2.10 PFI/ BSF costs at special schools, AP/ PRUs and Post 16 institutions only				£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
1.2.11 Direct payments (SEN and disability)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
1.2.13 Therapies and other health related services	£0.00	£1,982,285.00	£1,912,285.00	£0.00	£0.00	£0.00	£3,894,570.00	£0.00	£3,894,570.00
1.3.1 Central expenditure on early years entitlement	£1,758,700.00						£1,758,700.00	£0.00	£1,758,700.00
1.4.1 Contribution to combined budgets	£0.00	£7,500.00	£7,500.00	£0.00	£0.00		£15,000.00	£0.00	£15,000.00
1.4.2 School admissions	£0.00	£193,017.00	£193,017.00	£0.00	£0.00		£386,034.00	£0.00	£386,034.00
1.4.3 Servicing of schools forums	£800.00	£6,400.00	£6,400.00	£1,600.00	£800.00		£16,000.00	£0.00	£16,000.00
1.4.4 Termination of employment costs	£0.00	£262,000.00	£206,700.00	£6,900.00	£0.00		£475,600.00	£0.00	£475,600.00
1.4.5 Falling Rolls Fund	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00
1.4.6 Capital expenditure from revenue (CERA)	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00

Description	Early Years	Primary	Secondary	SEN/ Special Schools	AP/ PRUs	Post School	Gross	Income	Net
1.4.7 Prudential borrowing costs	£0.00	£96,238.00	£121,940.00	£0.00	£0.00		£218,178.00	£0.00	£218,178.00
1.4.8 Fees to independent schools without SEN	£0.00	£75,000.00	£75,000.00	£0.00	£0.00		£150,000.00	£0.00	£150,000.00
1.4.9 Equal pay - back pay	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00
1.4.10 Pupil growth	£0.00	£24,083.00	£711,148.00	£0.00	£0.00		£735,231.00	£0.00	£735,231.00
1.4.11 SEN transport	£0.00	£373,000.00	£152,000.00	£115,000.00	£0.00	£0.00	£640,000.00	£0.00	£640,000.00
1.4.12 Exceptions agreed by Secretary of State	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
1.4.13 Infant class sizes		£0.00					£0.00	£0.00	£0.00
1.4.14 Other Items	£0.00	£110,000.00	£93,000.00	£2,700.00	£0.00	£0.00	£205,700.00		£205,700.00
1.5.1 Education welfare service							£107,900.00	£0.00	£107,900.00
1.5.2 Asset management							£76,000.00	£0.00	£76,000.00
1.5.3 Statutory/ Regulatory duties							£435,300.00	£0.00	£435,300.00
1.6.1 Central support services							£0.00	£0.00	£0.00
1.6.2 Education welfare service							£0.00	£0.00	£0.00
1.6.3 Asset Management							£0.00	£0.00	£0.00
1.6.4 Statutory/ Regulatory duties							£0.00	£0.00	£0.00
1.6.5 Premature retirement cost/ Redundancy costs (new provisions)							£0.00	£0.00	£0.00
1.6.6 Monitoring national curriculum assessment							£0.00	£0.00	£0.00
1.6.7 School Improvement							£50,845.00	£0.00	£50,845.00
1.7.1 Other Specific Grants	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
1.8.1 TOTAL SCHOOLS BUDGET (before Academy recoupment)	£28,188,969.00	£105,525,387.00	£127,469,007.00	£34,168,003.00	£6,010,662.00	£3,684,500.00	£305,716,573.00	£0.00	£305,716,573.00
1.9.1 Estimated Dedicated Schools Grant for 2024-25 (before academy recoupment), excluding high needs place funding for 16-19 academies and free schools and FE colleges and independent learning providers							£296,885,660.00		
1.9.2 Dedicated Schools Grant brought forward from 2023-24 (please show a deficit as a negative)							-£1,391,037.00		
1.9.3 Dedicated Schools Grant carry forward to 2025-26 (please show a deficit as a positive)							£7,315,685.00		
1.9.4 Grant for maintained school sixth forms							£2,906,273.00		
1.9.5 Local Authority additional contribution							£0.00		
1.9.6 Total funding supporting the Schools Budget (the sum of lines 1.9.1 to 1.9.5)							£305,716,581.00		
1.10.1 Academy recoupment from the Dedicated Schools Grant of schools block funding (show as a negative)							-£151,263,712.00		
1.10.2 Academy recoupment from the Dedicated Schools Grant of high needs place funding shown under line 1.0.2 (show as a negative)							-£8,282,167.00		
2.0.1 Central support services							£0.00	£0.00	£0.00
2.0.2 Education welfare service							£241,500.00	£0.00	£241,500.00
2.0.3 School improvement							£255,200.00	£0.00	£255,200.00
2.0.4 Asset management - education							£0.00	£0.00	£0.00
2.0.5 Statutory/ Regulatory duties - education							£405,000.00	£0.00	£405,000.00
2.0.6 Premature retirement cost/ Redundancy costs (new provisions)							£0.00	£0.00	£0.00

Description	Early Years	Primary	Secondary	SEN/ Special Schools	AP/ PRUs	Post School	Gross	Income	Net
2.0.7 Monitoring national curriculum assessment							£0.00	£0.00	£0.00
2.1.1 Educational psychology service							£551,600.00	£0.00	£551,600.00
2.1.2 SEN administration, assessment and coordination and monitoring							£1,243,800.00	£0.00	£1,243,800.00
2.1.3 Independent Advice and Support Services (Parent partnership), guidance and information							£178,600.00	£0.00	£178,600.00
2.1.4 Home to school transport (pre 16): SEN transport expenditure	£0.00	£1,154,310.00	£441,365.00	£4,018,619.00	£246,585.00		£5,860,879.00	£42,000.00	£5,818,879.00
2.1.5 Home to school transport (pre 16): mainstream home to school transport expenditure	£0.00	£188,600.00	£0.00	£0.00	£0.00		£188,600.00	£0.00	£188,600.00
2.1.6 Home to post-16 provision: SEN/LLDD transport expenditure (aged 16-18)			£75,017.00	£1,678,624.00	£4,665.00	£268,708.00	£2,027,014.00	£17,500.00	£2,009,514.00
2.1.7 Home to post-16 provision: SEN/LLDD transport expenditure (aged 19-25)			£6,388.00	£388,087.00	£0.00	£623,432.00	£1,017,907.00	£10,500.00	£1,007,407.00
2.1.8 Home to post-16 provision transport: mainstream home to post-16 transport expenditure			£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
2.1.9 Supply of school places							£160,700.00	£0.00	£160,700.00
2.2.1 Other spend not funded from the Schools Budget							£0.00	£0.00	£0.00
2.3.1 Young people's learning and development			£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
2.3.2 Adult and Community learning							£306,100.00	£270,600.00	£35,500.00
2.3.3 Pension costs							£0.00	£0.00	£0.00
2.3.4 Joint use arrangements							£0.00	£0.00	£0.00
2.3.5 Insurance							£0.00	£0.00	£0.00
2.4.1 Other Specific Grant							£0.00	£0.00	£0.00
2.5.1 Total Other education and community budget							£12,436,900.00	£340,600.00	£12,096,300.00
3.0.1 Funding for individual Sure Start Children's Centres							£429,700.00	£168,300.00	£261,400.00
3.0.2 Funding for local authority provided or commissioned area wide services delivered through Sure Start Children's Centres							£0.00	£0.00	£0.00
3.0.3 Funding on local authority management costs relating to Sure Start Children's Centres							£1,079,200.00	£1,079,200.00	£0.00
3.0.4 Other spend on children under 5							£0.00	£0.00	£0.00
3.0.5 Total Sure Start children's centres and other spend on children under 5							£1,508,900.00	£1,247,500.00	£261,400.00
3.1.1 Residential care							£11,868,100.00	£0.00	£11,868,100.00
3.1.2a Fostering services (excluding fees and allowances for LA foster carers)							£910,900.00	£0.00	£910,900.00
3.1.2b Fostering services (fees and allowances for LA foster carers)							£6,203,100.00	£226,800.00	£5,976,300.00
3.1.3 Adoption services							£1,114,600.00	£100,000.00	£1,014,600.00
3.1.4 Special guardianship support							£1,559,900.00	£0.00	£1,559,900.00
3.1.5 Other children looked after services							£1,883,500.00	£100,000.00	£1,783,500.00
3.1.6 Short breaks (respite) for looked after disabled children							£0.00	£0.00	£0.00
3.1.7 Children placed with family and friends							£0.00	£0.00	£0.00
3.1.8 Education of looked after children	£0.00	£0.00	£0.00	£0.00	£0.00		£0.00	£0.00	£0.00
3.1.9 Leaving care support services							£3,541,600.00	£56,000.00	£3,485,600.00

Description	Early Years	Primary	Secondary	SEN/ Special Schools	AP/ PRUs	Post School	Gross	Income	Net
3.1.10 Asylum seeker services children							£2,474,400.00	£2,474,400.00	£0.00
3.1.11 Total Children Looked After	£0.00	£0.00	£0.00	£0.00	£0.00		£29,556,100.00	£2,957,200.00	£26,598,900.00
3.2.1 Other children and families services							£2,115,000.00	£0.00	£2,115,000.00
3.3.1 Social work (including LA functions in relation to child protection)							£7,319,166.67	£560,933.33	£6,758,233.34
3.3.2 Commissioning and Children's Services Strategy							£4,323,790.00	£339,820.00	£3,983,970.00
3.3.3 Local Safeguarding Children Board							£160,300.00	£92,300.00	£68,000.00
3.3.4 Total Safeguarding Children and Young People's Services							£11,803,256.67	£993,053.33	£10,810,203.34
3.4.1 Direct payments							£846,500.00	£0.00	£846,500.00
3.4.2 Short breaks (respite) for disabled children							£1,215,200.00	£0.00	£1,215,200.00
3.4.3 Other support for disabled children							£0.00	£0.00	£0.00
3.4.4 Targeted family support							£3,467,633.33	£1,366,466.67	£2,101,166.66
3.4.5 Universal family support							£0.00	£0.00	£0.00
3.4.6 Total Family Support Services							£5,529,333.33	£1,366,466.67	£4,162,866.66
3.5.1 Universal services for young people							£108,900.00	£1,800.00	£107,100.00
3.5.2 Targeted services for young people							£478,500.00	£365,000.00	£113,500.00
3.5.3 Total Services for young people							£587,400.00	£366,800.00	£220,600.00
3.6.1 Youth justice							£921,100.00	£305,500.00	£615,600.00
4.0.1 Capital Expenditure from Revenue (CERA) (Non-schools budget functions and Children's and young people services)							£0.00	£0.00	£0.00
5.0.1 Total Schools Budget and Other education and community budget (excluding CERA)(lines 1.8.1 and 2.5.1)							£318,153,473.00	£340,600.00	£317,812,873.00
5.0.2 Total Children and Young People's Services and Youth Justice Budget (excluding CERA)(lines 3.0.5 + 3.1.11 + 3.2.1 + 3.3.4 + 3.4.6 + 3.5.3 + 3.6.1)							£52,021,090.00	£7,236,520.00	£44,784,570.00
6 Total Schools Budget, Other education and community budget, Children and Young People's Services and Youth Justice Budget (excluding CERA) (lines 5.0.1 + 5.0.2)							£370,174,563.00	£7,577,120.00	£362,597,443.00
7 Capital Expenditure (excluding CERA)	£45,000.00	£3,000,000.00	£4,300,000.00	£2,630,000.00	£350,000.00		£10,325,000.00	£0.00	£10,325,000.00
8a.1 Substance misuse services (Drugs, Alcohol and Volatile substances) (included in 3.5.1 and 3.5.2 above)							£0.00	£0.00	£0.00
8a.2 Teenage pregnancy services (included in 3.5.1 and 3.5.2 above)							£0.00	£0.00	£0.00
1.8.1a DSG Block Planned Expenditure							Allocated DSG funding	Planned Spend	Net
Schools (before academy recoupment)							£207,763,812.00	£206,789,141.00	£974,671.00
Central School Services							£2,006,337.00	£2,085,712.00	-£79,375.00
High Needs (excluding post school)							£59,697,303.00	£66,517,248.00	-£6,819,945.00
Early Years							£27,418,208.00	£27,418,208.00	£0.00
Total							£296,885,660.00	£302,810,309.00	-£5,924,649.00

S251 Budget 2024-25 - High Needs Places Table Report

Department for Education Section 251 Financial Data Collection

Report produced on 02/10/2024 12:27:58

Local Authority: 319 Sutton London Borough Council

School Name	DFE Number	Is School/Unit Opening/Closing In-Year?	Date Opening Closing	Type of Establishment	Special Educational Needs (SEN) Places		SEN Place Funding	Alternative Provision (AP) Places		AP Place Funding	Hospital Education Places		Hospital Education Place Funding	Total Place Funding
					April 2024 to August 2024	September 2024 to March 2025	April 2024 to March 2025 (£)	April 2024 to August 2024	September 2024 to March 2025	April 2024 to March 2025 (£)	April 2024 to August 2024	September 2024 to March 2025	April 2024 to March 2025 (£)	April 2024 to March 2025
Thomas Wall Nursery School	1001			Mainstream	10.00	10.00	£100,000.00							£100,000.00
Foresters	2043			Mainstream	42.00	42.00	£252,000.00							£252,000.00
Muschamp Primary School	2049			Mainstream	52.00	52.00	£312,000.00							£312,000.00
Sutton Tuition and Reintegration Service	1102			PRU				75.00	75.00	£750,000.00				£750,000.00
Sherwood Park School	7002			Special	170.00	180.00	£1,758,333.33							£1,758,333.33
Grand Total:					274.00	284.00	£2,422,333.33	75.00	75.00	£750,000.00				£3,172,333.33

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Report Title	Free School Meals for pupils attending education otherwise than at school and Pupil Premium funding for independent provision
Meeting	Schools Forum
Meeting Date	15 October 2024
Chair	Jenny Sims
Report Author(s)	Jack Cutler, Acting Head of Pupil Based Commissioning
Open/Exempt	Open

1. Summary

1.1. This report provides a proposal on the consideration of funding for children eligible for Free School Meals provision attending education otherwise than at school and Pupil Premium funding for independent provision.

1.2. Recommendation(s)

1.3. To agree to the proposal that Sutton begins, from January, to establish FSM eligibility for children in an EOTAS setting, and to issue annual food vouchers to a value of £2.65 daily.

2. Background and Key Information

Free School Meals for pupils attending education otherwise than at school

2.1. In Sutton, 12.4% of the total school population are receiving free school meals (FSM). As of December 2023, Sutton has 25 learners with an EHCP attending EOTAS provision (as of 9 October 2025). All of these learners have an EHCP. Therefore approximately 2 to 3 of these learners will be FSM eligible according to these statistics. Given the FSM factor within the national funding formula 24/25 was £490 per child, the cost to provide FSM's would be approximately £1,500 per year, for children on an EOTAS package of support, who are not registered with a school.

2.2. In March 2024, the DfE published updated Free School Meal guidance¹.

2.3. This guidance makes it clear no specific provision is made in legislation for free school meals to be provided to children who are in receipt of EOTAS.

2.4. However, the DfE state they expect local authorities to consider making equivalent food provision for children who are receiving EOTAS under section 61 of the Children and Families Act 2014 who meet both of the following criteria:

- the child would meet the benefits-related criteria for free school meals if they were in a state-funded school (for more information see pages 5-8 of this guidance); and

¹ https://assets.publishing.service.gov.uk/media/65fdad5965ca2f00117da947/Free_school_meals.pdf

- the meals would be provided in conjunction with education and would, in line with the aim of free school meal provision, be for the purpose of enabling the child to benefit fully from the education being provided.
- 2.5. Once this consideration has been made, local authorities should then assess the individual circumstances of the child to decide whether and how such provision can be made.
- 2.6. Local authorities may use DSG funding to fund such provision. Given there is no available funding from within the Schools block, the high needs Block would need to be utilised for this process.
- 2.7. Alongside the cost of providing the meals, there will be an administrative cost to this; the council would need to confirm eligibility, and process meal vouchers. A preliminary annual cost for this would be approximately £300 - this will be refined further as the process is developed.
- 2.8. Given the overall relatively minor cost of providing this provision, it is proposed that Sutton begins, from January, to establish FSM eligibility for children in an EOTAS setting, and to issue annual food vouchers to a value of £2.65 daily (this is inline with the Greater London Authority Free school meal for all junior age children offer).

Pupil Premium for Independent schools.

- 2.9. The pupil premium grant is funding to improve educational outcomes for disadvantaged pupils in state-funded schools in England. An overview of Pupil Premium funding can be found from the DfE website below:
- 2.10. <https://www.gov.uk/government/publications/pupil-premium/pupil-premium>
- 2.11. Pupil premium funding is allocated to eligible schools based on the number of:
- Pupils who are recorded as eligible for free school meals, or have been recorded as eligible in the past 6 years (referred to as Ever 6 FSM)
 - Children previously looked after by a local authority or other state care, including children adopted from state care or equivalent from outside England and Wales
- 2.12. Pupil premium funding is allocated to local authorities based on the number of:
- looked-after children, supported by the local authority
 - pupils who meet any of the eligibility criteria and who attend an independent setting, where the local authority pays full tuition fees
 - The pupil premium grant is funding to improve educational outcomes for disadvantaged pupils in state-funded schools in England.
- 2.13. Where pupil premium is provided to local authorities for eligible pupils in independent settings where the local authority pays full tuition fees. It is for the local authority to decide how much of this funding to pass on to the child's school.

- 2.14. Pupils who are eligible for free school meals, or have been eligible in the past 6 years attract £1,480 for each primary age pupil per year, and £1,050 for each secondary age pupil.
- 2.15. To ensure that pupil premium is focused on effective approaches to raising the educational attainment of disadvantaged pupils, schools (including local authority virtual schools) must spend their pupil premium grant (excluding service pupil premium) on evidence-informed activities in line with the 'menu of approaches' set by the Department for Education (DfE).
- 2.16. Given that when the LA places a child with an EHCP into an independent setting, the LA does not fund the Independent school a higher rate for a disadvantaged learner, it would seem appropriate for the LA to pass the full disadvantaged pupil premium funding attributable to that child to the independent school, to support with their learning.
- 2.17. It is proposed the full funding amount attributable to the child will be provided to the independent school on the condition it is allocated to support the child who attracted the funding, and that any unspent PPG funding should be returned to the LA.

3. Appendices

Appendix Letter	Appendix Title
N/A	N/A

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Report Title	SEND Transformation / Education Operational Group Update
Meeting	Schools Forum
Date	15 October 2024
Chair	Jenny Sims
Report Author(s)	Kieran Holliday, Acting Strategic Lead for Education, Sutton Council.
Open/Exempt	Open.

Purpose

- 1.1 The purpose of this paper is to:
- A - Provide an update on the initial work that has been undertaken by the Education Operational Group in relation to Priority 5 of the Sutton SEND and AP Strategy.
 - B - To set out the expected timescales that will be involved to produce a DSG management plan in the Borough including the input that will be sought from the Schools Forum.
 - C - To request the School Forums agreement to a Block Transfer from the Schools Block to the High Needs Block for the financial year 2025/26 given the forecast overspend position for this year.

Recommendation

- 1.2 Schools Forum note the update on the early work of the Education Operational Group (EOG) and the expected timescales to produce a draft DSG Management Plan.
- 1.3 To determine the Local Authority's request to transfer 0.5% from the Schools Block to the High Needs Block in 2025/26

Background / Context

- 1.4 Nationally the number of children and young people with education, health and care plans (EHCPs) has risen by 140%, from 240,183 in 2014/15 (which includes EHCPs and statements) to 575,973 in 2023/24. This figure is 124% in London. Nationally, 1.4% of the population aged 0-25 had a statement of SEN or an EHCP, but by 2023/24 that figure had risen to 3.3% both nationally and in London. SEN support has also been increasing - nationally those requiring SEN Support rose by 25% over the same period, compared with a 6% rise in overall pupil numbers.

- 1.5 Pupils with autism spectrum disorder (ASD), social, emotional and mental health (SEMH) needs, or speech, language and communication needs (SLCN) account for 88% of the total increase in pupils with EHCPs between 2015/16 and 2023/24.
- 1.6 Despite increased government funding, it hasn't matched the rising costs of EHCPs and specialist services, leading to significant overspending by Local Authorities (LAs). The national in-year deficit in 2023-24 deficit of £890 million is projected to reach £1.3 billion over the next two years.
- 1.7 It is estimated that the cumulative high needs deficit has risen from £300 million in 2018-19 to £3.16 billion currently. Without additional investment through, for example, the Safety Valve programme, the cumulative national deficit would be closer to £4 billion.
- 1.8 There is near national consensus that the SEND system is in need of reform. A report commissioned by the County Council's Network and LGA sets out this case comprehensively in a report they published prior to the summer break - [TOWARDS AN EFFECTIVE AND FINANCIALLY SUSTAINABLE APPROACH TO SEND](#))

A - Local Context - Education Operational Group and our Local Context and latest SEN2 Data (published June 2024)

- 1.9 People Committee signed off the [SEND and AP strategy](#) on the 26 September 2024. The strategy sets out 5 priorities as per the below.

1	Earlier Identification and more timely support for children and young people with SEND and additional needs so that their needs don't escalate
2	Embed joined up and relational practice - so parents and young people receive more coordinated support when they need it
3	Strengthen access to education for vulnerable pupils to ensure a sufficiency of high quality specialist and Alternative Provision in the Borough
4	Grow the voice and influence of children and young people / parents and improve the way we listen and act on feedback
5	A more financially sustainable system so we live within our means and prioritise resources on those children and young people that need them most.

- 1.10 As part of priority 5, the Council had set aside £250k from the Council's general fund to invest in a transformation team to start to develop a DSG management plan. The 'Educational Operational Group' is made up of LBS and Cognus staff as well as two seconded headteachers (Nick House and Danielle Scrase) that are leading on the work from a schools perspective one day a week.

1.11 The Educational Operational Group has met twice with the following activity undertaken to date:

- Group established, TOR signed off
- Reviewed key financial and non financial datasets in SEND - in order to start to develop KLOE
- Reviewing all safety valve agreements in terms of learning from successful cost-reduction strategies in other boroughs including visits to local area partners (e.g. Croydon)

What is the data telling us?

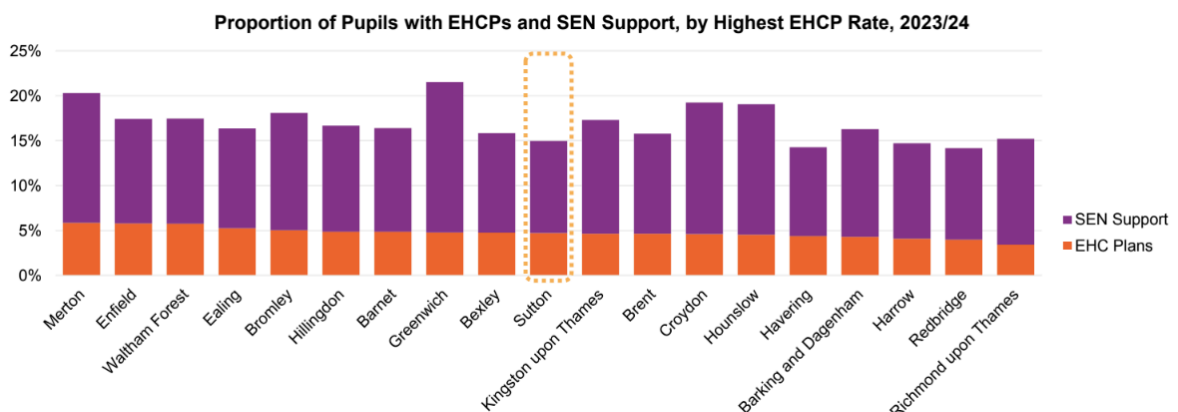
1.12 There is a lot more work to do to interrogate and widen the breadth of the information that has been reviewed, however some initial observations at this stage from the group are set out below.

1.13 Whilst there is no doubt that the SEND system in Sutton is under significant strain, the data below suggests that Sutton is faring reasonably well in comparison to some of the national and regional data comparators. However, there are some areas where Sutton is is more of an outlier - particularly in terms of requests for assessment, use of resourced provision as well as the per head spend..

Sutton Pen Picture

1.14 Number of EHCPs in Sutton - between 2014/15 and 2023/24 in Sutton, the increase in EHCPs has been by a lower proportion than nationally but has still risen significantly from 1,116 to 2410 (116%).

1.15 Proportion of pupils with EHCPs and SEN Support - Based on the latest published data Sutton has an average proportion of CYP with an EHCP and a slightly lower than average proportion of CYP with SEN support compared nationally.



1.16 SEND funding in Sutton - Sutton is generally well funded in comparison to other local areas. In 2021/22, Sutton was one of the highest funded London Borough's at £996 per

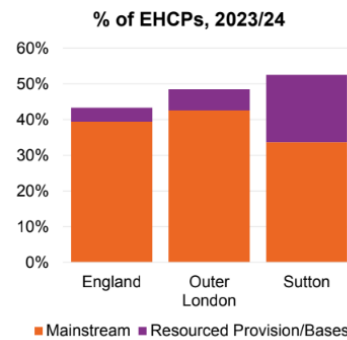
2-18 resident vs a London average of £804. This is in part because of the way that that national high needs funding formula has an historical element in the funding model.

1.17 **SEND Needs** - In a similar way to the national picture, Pupils with autism spectrum disorder (ASD) and children with social, emotional and mental health (SEMH) needs have risen the most significantly in Sutton.

Primary Need	ASD	SEMH	SLCN	MLD	SLD /PMLD	Other*	Total
2014/15	356	130	227	146	153	104	1,116
2023/24	940	313	319	309	148	381	2,410
% increase	164%	141%	41%	112%	-3%	266%	116%

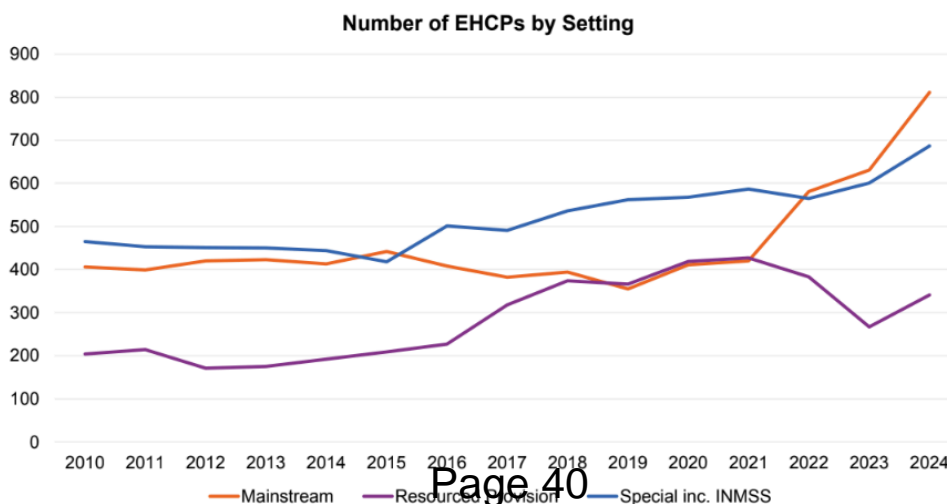
* includes VI, HI, PD, medical, MSI but also 'unrecorded' so difficult to derive meaning from this increase

1.18 **Mainstream provision** - Sutton has a larger proportion of EHCPs met in 'mainstream provision' than England and Outer London averages but when accounting for resourced provision the proportion of pupils with EHCPs in mainstream is lower. Recent years have seen a higher than average increase in mainstream EHCPs, but the overall result is still a smaller proportion of EHCPs in mainstream settings without resourced provision than peers.



1.19 Sutton has four times the proportion of Sutton CYP with EHCPs are in resourced provision than the national average. Sutton, has the highest proportion of pupils 2-18 in resourced provision in the England.

Resourced provision use correlates more closely to fewer mainstream EHCPs than special school EHCP rates



1.20 Specialist Placements

- Given high proportion of bases, in 2023 Sutton had a slightly smaller proportion of CYP in maintained and academy special schools (24%) than the national average (27%).
- Sutton's rate of growth in placements in special schools was ahead of the national average in 2023
- And our spend per head in special schools has risen more than the national average over the last three years.
- Sutton's cost per pupil on NMI schools is in line with other LAs but in the last couple of years pupils numbers have significantly increased in NMI schools (29% in the last year)

1.21 Requests for Assessment - Sutton has the second highest number of requests for assessment in London and these figures continue to grow - between 2022 and 2023 requests increased in Sutton by 28.7% in Sutton.

1.22 Timeliness / performance of SEND services

- Sutton provides a much more timely response to EHCPs with 20 weeks data at a significantly higher rate (93%) than the national average of (50%), the London average (70%) and against the average of statistical neighbours (65%).
- The percentage of assessments not agreed at the first request is broadly in line with the London and national rates and for those of statistical neighbours; the difference has closed on last year as London whilst national rates have increased.

1.23 Appeals to Tribunal - the Tribunal rate has dropped by 0.1% in Sutton 2023 (**the fourth successive drop since 2020**), but it is still higher than London (1.9%) and national (2.5%) averages but now in line with statistical neighbours (2.9%).

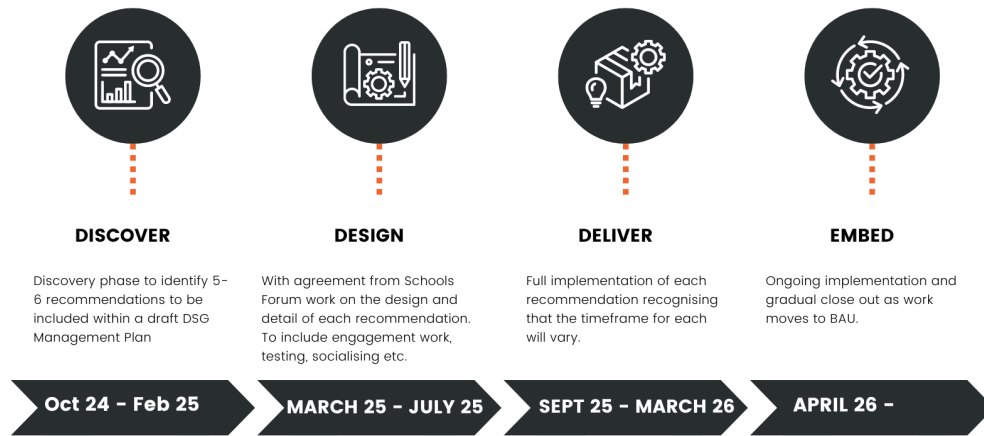
B - Next Steps and anticipated timescales to produce a DSG Management Plan

1.24 Given the complexity and scale of the work involved / resources available, timescales will always be subject to change, however the EOG are anticipating developing a draft DSG management plan to be reviewed and signed off by Schools Forum by February 2025 based on the following outline timetable.



EOG Timeline

Project goal: Production of a DSG management plan achieving a balanced high needs block budget within 3-5 years



C - Sutton's latest High Needs Block Position

- 1.25 Sutton like many Local Authorities is under significant pressure financially. The latest forecast for the Council's DSG position at the end of FY2024/25 is an in-year deficit position of £8.4m and an accumulated deficit of £10m. This is largely a result of the funding that is received from the Government over the last few years increasing by less than the costs of supporting a growing number of children with EHCPs in the borough.
- 1.26 Sutton is not an outlier here either. Based on a survey as part of the ISOS partnership report referred to in paragraph 1.6, of the 74 LAs that responded to their research, 65 (or 88%) recorded an in-year overspend for 2023-24, and similar proportions of LAs were projecting overspends in 2024-25 and 2025-26. However the level of in year overspend is concerning and if allowed to continue will result in a similar cumulative deficits to those Local Authorities that are part of the safety valve programme.
- 1.27 Clearly, creating a financially sustainable local SEND system will be a significant challenge in the local area given the current position. A realistic aim for the group will be to try and reduce the level of overspend over the next 2-3 years rather than to eradicate the deficit entirely. As such, whilst there is a strong local area plan in place, if nothing changes with the national policy or funding framework at a national level, then the pressures on the high needs block will remain significant for the foreseeable future.
- 1.28 The [ISOS report](#) provides critical context to the scale of the challenge facing Local Authorities and schools/partners when it comes to delivering statutory duties to children and young people with SEND under the current policy and legislative framework and the available resources.

- 1.29 It is not yet clear what the Government's position on this will be but DfE officials are being cautious to try and ensure Local Authorities don't think that lots more money will be forthcoming into the system so important we continue to try and manage spend as best possible.

High Needs Budget Setting Process for 2025/26 and Block Transfer Request / Disapplication Timeline

- 1.30 Last year, and for the first time, Schools Forum were asked (and accepted) a disapplication request for a block transfer of 0.5% from the schools block to the High needs block to support the overspend in this part of the DSG for 2024/25.
- 1.31 Given the pressures on the high needs block, the Local Authority has determined not to request more than the 0.5% requested last year but to continue to request that amount from the Schools Block to the High Needs block for 2025/26.
- 1.32 Modelling of what this would mean in financial terms for each school can't be done until the Council has had the provisional allocations for schools announced by the Government and the APT (not expected until December). However, last year the 0.5% equated to £1m being transferred from schools block to high needs block - a similar but slightly larger figure would be expected next year for 2024/25. Appendix A provides the breakdown of the figures at a setting level for 2024/25 and how this £1m was made up (current year). Please note this is as a guide only and **NOT** confirmed figures for 2025/26. If agreed, confirmed figures will be calculated once we have been provided with funding allocations from the DfE later in the year.
- 1.33 A block transfer requires the approval of the Schools Forum. If approval is given then the Local Authority would notify the ESFA and this would be included in the APT in January 2025. If it is not approved by Schools Forum then the Local Authority can still submit a 'disapplication' to be considered by the secretary of state. The deadline for a disapplication to be made is usually in Mid November (as yet unconfirmed by the DfE).
- 1.34 As has been reported previously, unfortunately it is relatively commonplace for Local Authorities to make such requests in light of the significant financial deficits that are being accrued on the high needs block.
- 1.35 Given the change in Government, the normal timescales for DSG allocations are delayed. Officers are working on the basis of the following timetable based on expectations (nothing yet confirmed from the DfE).
- Provision DSG allocations - expected November (normally July)
 - Deadline for disapplication - mid November (as was the case last year)
 - End of December - final DSG allocations published by Government
 - January - APT published (the spreadsheet that we use to plan the DSG budget including block transfers, growth, minimum funding guarantee, split sites etc....)
 - End of January - deadline for completed APT back to the ESFA
 - February - 2025/26 DSG budget confirmed at Schools Forum

- 1.36 As the timetable above suggests, a decision on whether to transfer funding from the schools block to the high needs block needs to be taken in advance of knowing what Sutton's final DSG allocation for 2025/26 is. Whilst this is difficult, it is highly likely that our high needs allocation for 2025/26 will not cover the forecast spend for that year given that there is currently an in year deficit of £8m which is likely to get worse in future years.

Appendix A - 0.5% transfer impact by school based on the 2024/25

School	NOR	Base Funding £	Total Deduction 0.5% Tfr to HNB & Growth in SB £	Adjusted Funding £	Adj. Avg per pupil £
Primary	968	4,689,975	4,661,177	(28,798)	(29.75)
Primary	873	4,136,115	4,110,144	(25,972)	(29.75)
Primary	726	3,821,851	3,800,252	(21,599)	(29.75)
Primary	722	3,610,285	3,588,806	(21,480)	(29.75)
Primary	654	3,364,870	3,345,414	(19,457)	(29.75)
Primary	652	3,044,052	3,024,655	(19,397)	(29.75)
Primary	648	3,334,748	3,315,470	(19,278)	(29.75)
Primary	629	3,196,232	3,177,520	(18,713)	(29.75)
Primary	608	3,244,217	3,226,129	(18,088)	(29.75)
Primary	504	2,427,196	2,416,076	(11,120)	(22.06)
Primary	496	2,516,349	2,501,593	(14,756)	(29.75)
Primary	431	2,081,288	2,068,465	(12,822)	(29.75)
Primary	429	2,329,932	2,317,169	(12,763)	(29.75)
Primary	424	2,080,934	2,068,320	(12,614)	(29.75)
Primary	419	2,132,934	2,120,468	(12,465)	(29.75)
Primary	419	1,967,895	1,955,430	(12,465)	(29.75)
Primary	417	2,124,199	2,111,793	(12,406)	(29.75)
Primary	411	2,062,830	2,050,603	(12,227)	(29.75)
Primary	406	2,232,282	2,220,204	(12,079)	(29.75)
Primary	393	2,002,245	1,999,800	(2,445)	(6.22)
Primary	389	1,904,280	1,892,707	(11,573)	(29.75)
Primary	388	2,323,255	2,311,712	(11,543)	(29.75)
Primary	383	1,970,701	1,959,306	(11,394)	(29.75)
Primary	371	1,778,383	1,767,345	(11,037)	(29.75)
Primary	360	2,068,182	2,057,472	(10,710)	(29.75)
Primary	359	1,750,299	1,739,619	(10,680)	(29.75)
Primary	358	1,891,308	1,880,657	(10,651)	(29.75)
Primary	358	1,812,235	1,801,584	(10,651)	(29.75)
Primary	353	1,771,990	1,761,488	(10,502)	(29.75)
Primary	352	1,830,963	1,820,491	(10,472)	(29.75)

Primary	293	1,560,981	1,552,264	(8,717)	(29.75)
Primary	270	1,440,554	1,432,522	(8,033)	(29.75)
Primary	269	1,362,410	1,354,407	(8,003)	(29.75)
Primary	263	1,450,388	1,442,563	(7,824)	(29.75)
Primary	262	1,449,856	1,442,062	(7,795)	(29.75)
Primary	262	1,375,797	1,368,002	(7,795)	(29.75)
Primary	250	1,570,550	1,563,113	(7,438)	(29.75)
Primary	241	1,330,116	1,322,946	(7,170)	(29.75)
Primary	234	1,434,107	1,433,119	(988)	(4.22)
Primary	191	1,004,892	1,004,892	0	0.00
Primary	148	983,290	983,288	(2)	(0.01)
Primary Total	17,583	90,464,963	89,971,046	(493,917)	(28.09)
Secondary	1,645	10,935,523	10,862,233	(73,291)	(44.55)
Secondary	1,555	11,026,299	10,956,957	(69,342)	(44.59)
Secondary	1,407	9,317,161	9,254,501	(62,661)	(44.53)
Secondary	1,267	9,169,200	9,112,682	(56,518)	(44.61)
Secondary	1,246	8,772,802	8,717,415	(55,387)	(44.45)
Secondary	1,206	8,138,070	8,084,323	(53,747)	(44.57)
Secondary	1,200	8,590,421	8,537,218	(53,203)	(44.34)
Secondary	1,078	6,700,120	6,651,890	(48,230)	(44.74)
Secondary	1,061	7,812,502	7,765,355	(47,147)	(44.44)
Secondary	1,045	6,672,243	6,625,580	(46,664)	(44.65)
Secondary	1,034	7,009,275	6,963,024	(46,251)	(44.73)
Secondary	952	5,954,735	5,912,254	(42,481)	(44.62)
Secondary	929	6,279,512	6,237,993	(41,519)	(44.69)
Secondary	750	4,751,998	4,718,523	(33,475)	(44.63)
Secondary	680	4,247,618	4,217,274	(30,344)	(44.62)
Secondary Total	17,055	115,377,480	114,617,219	(760,262)	(44.58)
Total avg	34,638	205,842,443	204,588,265	(1,254,178)	(36.21)
High Needs Block		0	1,038,819	1,038,819	
Growth in Schools Block		121,283	336,642	215,359	
				1,254,178	

Report Title	Exclusions Financial Adjustments and Arrangements
Meeting	Schools Forum
Meeting Date	15 October 2024
Chair	Jenny Sims
Report Author(s)	Jack Cutler, Acting Head of Pupil Based Commissioning
Open/Exempt	Open

1. Summary

- 1.1. This report provides an update on the permanent exclusion schools finance adjustment arrangements.

2. Recommendations

- 2.1. To note the proposal and to agree to the changes.

3. Background and Key Information

- 3.1. This report provides an update on the permanent exclusion schools finance adjustment arrangements. Arrangements are based on the School Finance Regulations and are reviewed each year to reflect amendments in legislation and/or rates.
- 3.2. In line with the Suspension and permanent exclusion guidance August 2024 the Local Authority is responsible for overseeing financial readjustments or payments and overseeing the transfer of funding following a permanent exclusion. This also includes where a financial adjustment has been ordered by a review panel.
- 3.3. Locally in Sutton, this adjustment amount is made up of:
1. Pro-rata statutory elements (AWPU) that include basic entitlement, and additional educational needs factors such as Free School Meals, English as an Additional Language.
- 3.4. and
2. An additional locally agreed amount that is paid to The Limes College, that includes Pupil Premium, which follows the child.
- 3.5. Note:
- The locally agreed process currently only applies to Sutton secondary schools.
 - If an excluded child does not attend the Limes College, the excluding school will be reimbursed the locally agreed element
 - For Sutton primary schools it is only the statutory factors that are adjusted / charged.
- 3.6. Out of Borough (OOB) schools are only required to pay statutory factors, they are not part of the local agreement.

- 3.7. The locally agreed non-statutory amount was introduced to provide an additional funding contribution to the Limes College to support with preventing exclusion initiatives, and support with reintegrating, where possible, excluding children back into a mainstream school.
- 3.8. In recent years a flat rate for exclusions has been charged to schools, that has varied depending on the term the exclusion took place. The flat rates charged in each term are set out in table 1 below.
- 3.9. *Table 1: Locally Agreed Termly adjustments 2021/22 - 2023/24*

Term	Period CYP Excluded	Current Termly Adjustment
Summer	April-July	£6,500
Autumn	September-December	£5,734
Spring	January-March	£4,968

- 3.10. These rates have not changed since 2021. This was not a conscious decision, rather when the local financial arrangements were initially agreed, no mechanism was introduced to vary the charges to reflect inflationary/ other pressures.

4. Rationale for change

- 4.1. Where the Locally agreed termly adjustment rates have not been uplifted since 2021, the statutory element of the adjustment has not remained static but increased in line with funding increases.
- 4.2. This has meant the non statutory adjustment, paid to the Limes College, has decreased. The rationale to uplift the agreed termly charges is to ensure the amount paid to the Limes College is not eroded over time due to inflationary/ other funding uplifts.

5. Proposed changes

- 5.1. It is proposed to make the following changes to the exclusion charges:
1. Uplift the termly adjustment amounts to account for inflationary cost, and funding increases
 2. Introduce an automatic uplift mechanism to these financial adjustments such that they are increased proportional to the average per- pupil funding increase.

These changes are explained in more detail below.

1. Uplift to termly adjustment amounts

The proposed termly adjustments, to apply between September 2024 and March 2025, are:

Term	Period CYP Excluded	Current Termly Adjustment £	Proposed 2024/25 Termly Adjustment (From Sep)	Percentage uplift
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			£	
Summer	April- July	6,500	7,413	14.05%
Autumn	September- December	5,734	6,540	14.05%
Spring	January- March	4,968	5,666	14.05%

Please note for the summer 2024 term, the lower 23/24 financial year rate has been applied. The summer term period is shown for comparative purposes only.

- 5.2. The uplift has been based on the average percentage uplift that has been applied to the National Funding Formula (NFF) KS3 and KS4 Basic Entitlement funding rates, between 2021/22 and 2024/25. The change in these NFF rates is set out below:

	2021/22	2024/25	% uplift
KS3 BE	4404	5022	14.03%
KS4 BE	4963	5661	14.06%

- 5.3. Secondary schools received the following per pupil funding rates in 204/25.

Exclusion Per Pupil Rate - 2024/25

information from APT 24/25

School Name	Phase	NOR	Basic Entitlement Total	AEN Total	Total 2024/25	Per pupil rate 2024/25
Overton Grange School	Secondary	1061	6,090,724	1,526,730	7,617,454	7,180
Carshalton Boys Sports College	Secondary	1267	7,297,165	1,667,616	8,964,781	7,080
Oaks Park High School	Secondary	1200	6,875,355	1,513,962	8,389,317	6,990
Greenshaw High School	Secondary	1555	8,953,327	1,855,729	10,809,056	6,950
Carshalton High School for Girls	Secondary	1246	7,154,815	1,414,699	8,569,514	6,880
Harris Academy Sutton	Secondary	1034	5,969,126	845,997	6,815,123	6,590
St Philomena's Catholic High School for Girls	Secondary	1206	6,940,317	1,002,268	7,942,585	6,590
The John Fisher School	Secondary	929	5,359,118	735,722	6,094,839	6,560
Cheam High School	Secondary	1645	9,464,344	1,249,987	10,714,332	6,510
Glenthorne High School	Secondary	1407	8,092,158	1,014,441	9,106,600	6,470
Wallington High School for Girls	Secondary	1045	6,023,879	453,800	6,477,679	6,200
Wallington County Grammar School	Secondary	750	4,321,661	248,961	4,570,622	6,090
Wilson's School	Secondary	952	5,484,562	279,791	5,764,353	6,050

Nonsuch High School for Girls	Secondary	1078	6,224,376	279,612	6,503,989	6,030
Sutton Grammar School	Secondary	680	3,917,544	151,829	4,069,373	5,980

As such, the contribution towards the Limes College will vary depending on the excluding school. A comparison of the proposal for 2024/25 against previous years, for the highest per-pupil funded school, is shown in Appendix A.

2. Introduce an automatic uplift mechanism

This mechanism will operate as follows:

next year % change = (next year average per pupil pupil-led funding/ current year average per pupil pupil led funding - 1) x 100

Changes to termly rates will apply from the 1st April annually, and will be shared in advance with schools.

5.4. **Example:**

For example, the 2024/25 year average per pupil pupil-led funding is £6,813; assuming the 25/26 per pupil pupil-led funding is £7,000, the total exclusion charges will be uplifted by 2.74%. This would result in the following exclusion charges for 2025/26:

Term	Period CYP Excluded	2024/25 Termly Adjustment (From Sep) £	Example 25/26 Termly Adjustment	Percentage uplift
Summer	April- July	7,413	7,616	14.05%
Autumn	September-December	6,540	6,719	14.05%
Spring	January-March	5,666	5,821	14.05%

Note: there are some exceptions to the above, where the pupil is excluded in either year 6 or year 11, which have been set out in Appendix B.

Implications

5.5. The Council's revenue budgets have been updated to reflect committed expenditure.

6. Appendices

Appendix Letter	Appendix Title

A	Example for Statutory and Non statutory adjustments for the proposed 24/25 rates against current and historic rates, for the school with the highest per-pupil funding
B	Exceptions in the adjustments that are ordinarily made

Appendix A - Example for Statutory and Non statutory adjustments for the proposed 24/25 rates against current and historic rates, for the school with the highest per-pupil funding

Comment	No. of weeks left to 31/3 (A)	Individual School BE + AEN Statutory AWPU (B)	TOTAL Statutory Recharge Retained by LBS (C)	Income LBS Agreed Termly Secondary Invoices (D)	TOTAL Non - Statutory Funding (D-C) (E)	increase % 24/25 values v 23/24 values	increase % 24/25 values v 21/22 values
Exclusion from school with highest Pupil Rate at the start of each term	How many weeks Statutory Income claimed	Total AWPU per pupil for School	Statutory Income (pro rata) kept by Sutton	Agreed termly invoice value	Total non-Stat income that goes to Limes		
21/22 values	48	6,170	5,695.38	6,500.00	804.62		
	28	6,170	3,322.31	5,734.00	2,411.69		
	10	6,170	1,186.54	4,968.00	3,781.46		
23/24 values	48	6,820	6,295.38	6,500.00	204.62		
	28	6,820	3,672.31	5,734.00	2,061.69		
	10	6,820	1,311.54	4,968.00	3,656.46		
24/25 AWPU using 23/24 Termly Invoice values	48	7,180	6,627.69	6,500.00	-127.69		
	28	7,180	3,866.15	5,734.00	1,867.85		
	10	7,180	1,380.77	4,968.00	3,587.23		

24/25 AWPUs using suggested uplift in termly invoice values	48	7,180	6,627.69	7,413.00	785.31	284%	-2%
	28	7,180	3,866.15	6,540.00	2,673.85	30%	11%
	10	7,180	1,380.77	5,666.00	4,285.23	17%	13%
Percentage increase in Highest Pupil Rate 24/25 v 21/22		16%					

Appendix B - Exceptions in the adjustments that are ordinarily made

Funding adjustments for pupils excluded in year 6 primary and year 11 Secondary

Where the permanent exclusion takes effect on or after 1st April in a school year at the end of which pupils of the same age, or age group, as the pupil in question normally leave that school before being admitted to another school with a different pupil age range, or cease to be of statutory school age the school will be charged the number of complete weeks remaining in that school year calculated from the relevant date.

Financial review panel

Where a financial adjustment has been ordered by a financial review panel, the LA will be informed of the financial adjustment value ordered by the review panel and will make relevant adjustments/request payment from the school.

Report Title	Capital Report
Meeting	Schools Forum
Meeting Date	15 October 2024
Chair	Jenny Sims
Report Author(s)	Jack Cutler, Acting Head of Pupil Based Commissioning
Open/Exempt	Open

1. Summary

- 1.1. This report provides an update on capital funding and further information on pupil place planning and any capital implications arising.

2. Recommendations

- 2.1. To note the summary of developments against the primary, secondary and special expansion programmes.

3. Background and Key Information

Basic Need Capital

- 3.1. The overall expansion programme costs (below) have been adjusted to reflect the latest position but remain similar to those last reported to Schools Forum in January.

	Previous estimate (Jun '24) £m	Current estimate (Sep '24) £m
Primary expansions	81.1	81.1
Secondary expansions	96.9	97.8
SEN expansions	16.7	17.1

Capital Maintenance Programme

24/25 programme

- 3.2. There remains £56k unallocated from the 2023/24 capital maintenance programme, to be carried forward into the 2024/25 programme.
- 3.3. The DfE has now confirmed Sutton's allocation for 2024/25 as £884,714. As such, the available budget for 24/25 is £940k. This programme is intended to address LA maintained school condition needs, and is allocated through the existing annual school bidding process. Schools submitted a total of 29 bids to be evaluated by the Asset Management Panel (AMP) Steering Group which met on 23 January 2024.
- 3.4. The value of the proposed programme of works totals £959k, which leaves no contingency for emergency winter works. Further work is being undertaken with schools that submitted successful projects to value engineer costs, with the intention to release a contingency to fund emergency winter works.

25/26 programme

An application process commenced in October 2024, with the AMP steering group meeting in December to confirm allocations. The programme will be predicated on an estimated available budget of £885k (the 2024/25 allocation amount, assuming a reduction in pupil numbers 3% (which impacts allocations) and funding rate uplift in line with a reasonable 3% inflation rate). Actual allocations are expected to be announced late Autumn.

Reinforced Autoclaved Aerated Concrete (RAAC) in school buildings

- 3.5. The Link School has reopened the Hall space at the Secondary site. RAAC had been identified following an intrusive survey, within the hall of the Secondary site of the Link Special School. The Hall had been closed off to staff and pupils since September 2023. Subsequent remedial work has been undertaken, funded by the DfE, and the Hall has recently been declared safe, and reopened for school use. There are no further updates on RAAC to report.

Place Planning - Secondary Programme

- 3.6. September 2024 pupil forecasts are lower than 2023 forecasts, and this is validated in Secondary application data for September 2024. The total number of Sutton applicants has decreased by 63 from September 2023, whilst the total number of 1st preference applications has reduced by 72 in -borough and 54 out of borough (a total reduction of 126). However, numbers are not forecast to reduce back to levels that can be accommodated within current school PANs until 2028/29.

- 3.7. Additional funding has been agreed through an urgency notice issued by the council to increase the budget available for the agreed expansion works at Oaks Park High School to £5.6m (which includes £500k investment in SEND provision from the SPCF), to support the additional 50 places being provided in all years between September 2022 - September 2028.
- 3.8. For September 2024 the following bulge classes have been agreed at Secondary:
- Carshalton Boys - 30 places
 - Carshalton Girls - 30 places
 - Cheam High School - 20 places
 - Oaks Park High School - 50 places
 - Overton Grange High School - 30 places

Total - 160 places

Place Planning - Primary Programme

- 3.9. Officers continue to discuss with schools options for permanent reductions in primary places, and school organisation changes, with consideration based on a variety of different factors including where pupils live, where birth rates have fallen most significantly, parental preferences and the location of delivered and planned housing developments.
- 3.10. Regarding Reception admissions for September 2024, applications continue to fall, with the total number for Sutton resident applications down by 23 compared with September 2023. The Local Authority will continue to work with schools to manage the increasing surplus places resulting from these falling numbers. Note, the planning area applications data refers to all applications, from children living both in, and outside of , Sutton, whilst the LA level data is for Sutton residents only.
- 3.11. No bugle classes are planned for September 2024; however applications in particular to current year 4 will continue to be monitored and the positions reviewed as appropriate.

Place Planning - SEND Programme

- 3.12. Notwithstanding the actions the council has taken to create additional specialist capacity in the borough, as stated above, the demand for specialist places continues to grow and most of the state funded specialist provision in the borough is now largely full. As a result, the council has commissioned places at the following schools for September 2024.
- Avenue Primary resource base - 60 to 101 places (this includes two bulge class at the main site, and the additional satellite provision at Wallington Primary Academy
 - Oakfield base at Woodfield School - 48 to 54 places
 - The Link Special School - 145 to 152 places
 - Sherwood Park Special School - 170 to 180 places

- The Limes College - 140 to 180 places (note the additional 40 places have been available from September 2023 as respite provision places, where they are not occupied by permanently excluded learners.
 - The Limes College additional 20 (That can support 50 young people concurrently) at risk of exclusion places at a new satellite to operate from Sunningdale Road, to open from January 2025.
- 3.13. Some capital funding has been agreed with schools to support these additional places; Expenditure against these projects will be reported against the SEND expansion programme.
- 3.14. In addition to these places, additional post-16 and post-19 provision places have been secured at Orchard Hill College, through a capital investment considered by the Councils Strategy and Resources Committee on 19th February 2024. This provision will refit the Sutton Life Centre to provide a further Orchard Hill College Centre to ultimately replace the Robin Hood Lane Centre, and to increase capacity from 32 to 72 places. This will be supported through a £2m capital grant from the Special Provision Capital Fund, along with up to a £1m capital contribution from the college. The provision will be available from April 2025.
- 3.15. Round 7 of the special provision capital fund was agreed through the co-opted Asset Management Plan steering group in June, with a total programme value of up to £2.7m.
- 3.16. The Local area has now received £15.7m between 2018/19 to 2024/25 through Special Provision Capital Funding (SPCF) allocations. The vast majority of this has been distributed to schools and other education settings through an application process overseen through a steering group of school headteachers and local area SEND representatives and officers. To date, there have been seven application rounds (held in the autumn and spring terms annually), across which £9.6m has either been spent or committed against projects schools have bid for. In addition to this, a further £3.6m has been allocated to LA managed projects at schools and other education settings.
- 3.17. There is £2.5m SPCF remaining unallocated for future projects. It has not yet been confirmed by the government whether any further future SPCF allocations will be made.

Place Planning - Free School Programme

- 3.18. There are two ongoing free school proposals in the borough. The first relates to Sutton Free School 2, which has now been named the Angel Hill Special Academy. This project is led by the Department for Education (DfE) to deliver a new 96 place Autism Spectrum Condition (ASC) special school on the proposed site of the disused all weather pitch at the Rosehill site - to be run by the Greenshaw Learning Trust (GLT). Planning consent for this school was granted on 7 February 2024. The anticipated opening date of the new building has slipped to September 2025, and there are concerns this date may slip further. A contingency to open the school in temporary accommodation is currently being considered with the academy trust and with the Department for Education; however DfE authorisation for the school to open in temporary accommodation has not yet been provided.

- 3.19. The second Free School project relates to the Carew Academy special school and the relocation of this school into a new special school on the Sheen Way site. Similarly, this project is led by the Department for Education (DfE). On site construction commenced in April this year, and the Carew Academy is expected to move into its new accommodation from January 2025. A grant of £130,000 has now been confirmed against this school project, from SPCF grant, to provide external play equipment for this school, as external play equipment is not within scope of the DfE free school programme.

4. Implications

- 4.1. The Council's capital budgets have been updated to reflect committed expenditure.

5. Appendices

Appendix Letter	Appendix Title
NA	NA

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