



## Warrington Schools Forum

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### Agenda

**Date:** Tuesday 8 October 2024

**Time:** 4.30 pm – 5.30 pm

**Venue:** via Teams

	Item	Enc / Verbal	Decision; Discussion; Information	Lead
1.	Apologies and welcome			Chair
2.	Minutes from the previous meeting and matters arising (18 June 2024)	Enc		Chair
3.	Membership and Schools Forum Constitution review (draft for comments)	Enc	Information / Discussion	Emma Norman / Louise Atkin
4.	Funding Update / Extraordinary meeting request / Deficit Procedures	Enc	Information	Emma Norman
5.	High Needs Update (a) Allocation of HN funding block for 2024/2025 (b) The notional SEN budget in mainstream schools	Enc Enc	Information and Discussion Decision	Louise Atkin Ellen Parry
6.	Growth Addition Fund Update	Enc	Information	Mark Sarjent
7.	AOB			Chair
8.	<b>Meeting schedule for 2025:</b> All Tuesdays at 4.30 – 6.30 pm via Teams except January at 5.15 – 7.00 pm  <ul style="list-style-type: none"> <li>• 14 January 2025 (face to face)</li> <li>• 18 March 2025</li> <li>• 17 June 2025</li> <li>• 14 October 2025</li> </ul>			

## Warrington Schools Forum

Minutes – 18 June 2024 (via Teams)

Draft to be confirmed October 2024

### Membership

Membership with differentiated voting rights ~ Total Membership of 28, of whom 22 are entitled to vote on funding formula issues											
Sector Representation (22)	Appointed by the Council following election by:	Member	Dates and Attendance								
			11 October 2022	17 January 2023	21 March 2023	20 June 2023	10 October 2023	16 January 2024	19 March 2024	18 June 2024	
Maintained Nursery School Senior Staff (1)	Primary Headteachers Group	Marcia Atherton	A	P	P	P	P	P	P	P	
Special School Staff (1)	Special School Headteachers Group	Lucinda Duffy	P	P	P	P	P	P	P	P	
Special School Governor (1)	Governors Forum	Hazel Coen	P	P	P	A	P	P	P	P	
PRU (1)	PRU Management Board	Lindsay Regan	A	A	A	A	X	A	A	X	
Academy – all phases (9)  Agreed this should be: (5 secondary including UTC) (4 primary)	Academy Schools (secondary)	Gwyn Williams	P	P	P	P	A	P	A	P	
		Emma Mills (from June 2024)	-	-	-	-	-	-	-	-	A
		John Carlin	A	P	P	P	P	P	P	P	A
		Christian Wilcocks	P	P	A	A	S	P	P	P	A
	Academy Schools (primary)	Gary Cunningham <b>CHAIR - Schools Forum</b>	P	P	P	P	P	P	P	P	P
		Jane Rooney (from March 2024)	A	A	A	P	A	-	P	P	P
		Sarah Morris (from June 2024)	P	P	P	P	P	P	P	P	P
		Craig Burgess	P	P	P	A	P	P	P	P	P
	UTC	Chris Hatherall	A	P	A	A	P	A	P	A	A
	Maintained Primary School Sector (6)	WAPH and Governors Forum	Siobhan Bentley	P	A	P	A	P	P	A	A
Kathryn Berry			A	A	P	P	P	P	A	A	
Andy Hayes (from March 2024)			A	P	P	P	P	-	A	P	
Ian Moss			A	P	P	A	A	P	P	A	
Vacant (from June 24) Governor			P	P	P	A	X	P	P	-	
Donna Kendal Governor			A	P	A	A	P	P	A	A	
Maintained Secondary School Sector (2)	WASCL	Chris Hunt	P	P	A	A	S	P	P	P	
		Ed McGlinchey	P	P	A	A	A	A	A	A	
Private Voluntary and Independent Providers (1)	PVI Providers Forum	Vacant	P	A	A	A	X	A	A	-	

Representing	Member	Dates and Attendance							
		11 October 2022	17 January 2023	21 March 2023	20 June 2023	10 October 2023	16 January 2024	19 March 2024	18 June 2024
<b>Non-Schools Members (6)</b>									
Anglican Diocese (1)	Jane Griffiths	A	A	A	X	X	P	A	P
Roman Catholic Diocese (1)	Vacant	A	A	A	X	-	-	-	-
16-19 Institutions (1)	Damian McGuire	P	P	P	P	P	P	P	P
Parent Governor (1)	Vacant	-	-	-	-	-	-	-	-
NEU (Trades Union)	Lucie Humphreys	P	P	P	P	P	P	P	P
NASUWT (Trades Union)	Laura Watson	P	A	P	P	P	P	P	P

Representing		11 October 2022	17 January 2023	21 March 2023	20 June 2023	10 October 2023	16 January 2024	19 March 2024	18 June 2024
<b>Warrington Borough Council</b>									
Director of Education and Inclusion (Deputy DCS)	Paula Worthington	P	A	P	P	A	P	P	P
Head of Service – Quality Education and Learning	Louise Atkin	A	P	P	P	P	P	P	P
Finance Manager	Janet Davies (from Jan 2024)	S	P	P	P	-	P	P	P
Senior Accountant (Schools)	Emma Norman (from March 2024)	P	P	P	P	P	P	P	P

**Key:**

**P** ~ Present

**A** ~ Apologies

**X** ~ Absent with no apologies

**C** ~ Meeting cancelled

**S** ~ Substitute

**-** ~ Vacancy

**O** ~ Observer

**Presenting item:**

Felicity Wisken

for item 7

**Minutes:**

Gill Sykes

## 1. Apologies and Welcome

The chairperson, Gary Cunningham, welcomed everyone to the meeting and apologies were noted.

With regard to membership:

- Janet Lazarus (Governor) has stepped down from Schools Forum and asked for her good wishes to be passed onto forum members. The chair wanted to note thanks to Janet for her long service and dedication to Schools Forum.
- Kathryn Berry (St Lewis) retires at the end of this academic year and the chair thanked Kathryn for her engagement with Schools Forum. With effect from the new academic year, Helen Graham (Cherry Tree) will take on the Schools Forum vacancy for Maintained Primary Schools left by Kathryn.
- Emma Mills was welcomed as a secondary academy rep.

## 2. Minutes and Matters Arising (from 19 March 2024)

The minutes were accepted as a true record and the following was noted:

- Page 7 bullet point 8: Lucinda noted that where it says “they” met with Stephen McNulty it was just Lucinda who met with him.
- Page 6 bullet point 5: Hazel referred to £154K shortfall identified and the minutes saying, “Lucinda noted there have been conversations previously and it is worth noting there is a difference in the level of need reflected in the level of funding, it is important to review it.” Hazel stated that she felt it was herself and Lucinda who made this comment. Lucinda clarified that she had made the comment and recalled herself doing so and that for the purposes of accuracy of the minutes, she can confirm that they are an accurate account of what she said.

Hazel noted there has been a change in the level of need and the difference is not as great as it was previously and Green Lane children are presenting with higher levels of need. The chair noted that Hazel is a special schools rep at Schools Forum and the discussion around assessing the level of need is for the SEND Review Board and is not a Schools Forum matter. The chair suggested this could be picked up as an agenda item at SEND Review Board. Louise clarified that this discussion is not for this group and has been picked up through different channels.

## 3. SLAs – response to in-year increase

Stephen McNulty sent his apologies and will provide written responses to all the queries already raised. This will be forwarded with the minutes.

## 4. Outturn Report

Emma Norman presented her report to the forum which is to notify Schools Forum of the confirmed outturn position for the central Dedicated Schools Grant (DSG) allocations for 2023/24. This includes whole-school activities and central education functions, but excludes individual school balances, which are reported on separately. It also briefs on the wider closing position for Education and SEND.

There is an underspend of £1.6m in DSG and the majority is EY funding which will be held in a balance until we have had the recalculation of funding in July and after that will distribute any funding remaining. We do anticipate all money will be spent across the financial year which is apart from the underspend last year. With regards to de-delegation there wasn't anything to redistribute with maintained schools, it was all spent. With the wider education budget there is an overspend of £100K and there has been a change to

the structure of education and SEND with EH now under Children's Social Care, this would be the main difference. The overall picture for Families and Wellbeing is £15.8m overspend in adults and children's social care and we have never been at that level before. For adults it is in the under 65s with increased demand around mental health problems and within children's social care it is providing residential support by private providers for children with significant needs which is demand led.

Janet Davies noted that across families and wellbeing it is commissioned care that has the biggest spends and individual placements are rising because of demand across the country. In Adult social care there is a growing need with the under 65s and with others living longer. Adult social care can claim back some monies in client contributions.

The chair invited questions or comments and none were made.

Recommendations:

- (i) Schools Forum is asked to note the 2023/24 outturn position for DSG, and that this underspend will be brought forward in anticipation of an adjustment from the ESFA. **NOTED**
- (ii) Maintained school representatives are asked to note that no additional balances are due to be returned in respect of de-delegated services. **NOTED**

## 5. Maintained Balances

Emma Norman presented her report to the forum which is to notify Schools Forum members of the final individual balances for Warrington maintained schools as at the end of the 2023/24 financial year, and to compare the overall picture with the corresponding situation in the previous year. For the first time in several years, there were no in-year conversions to academy for Warrington schools, so the two financial year out-turns are directly comparable.

The aggregate of school balances for Warrington maintained schools at the end of the previous financial year was £10.2m which is an increase from last year's figure of £9m. There was a 3% increase on the amount of interest and it increased balances significantly for those schools. Settings with an excess balance which may merit deeper investigations are 24 primaries, 3 secondaries, 3 special including one 6<sup>th</sup> form provision plus the nursery school. They recorded balances over the recommended 8% for primaries and specials and 5% for secondaries and this is slightly more than last year. Emma recommended the figures are taken with caution as schools funding is not changing but costs are increasing dramatically year on year. Some schools with high balances this year may be using this to set a budget and there is context behind the balances. Emma noted that they inform these settings of the excess and there is notional clawback, from pre-meetings there are some caveats to putting in clawback and would impact the schools for using the balances in the next year. The finance team has been in discussion with schools about this.

Questions/Comments:

- Gary asked for a brief explanation of why the excessive balances are carried forward. Emma noted they are looking at the committed balances rather than the carried forward. 95% is committed balances and there are decisions in the future around maintaining levels of funding and expenditure.
- Chris Hunt noted it was perverse the minimum schools can clawback whereas academies can build up reserves. There are probably capital projects in the future and reasons for the amounts of money. It is not just trying to hold the money, it is to set budgets for the future.
- Paula urged a note of caution, people take away the papers and read the numbers but don't necessarily have the context.

- Paula noted that individual budget meetings were held with all schools with a deficit budget and they are doing everything they can within their powers to address.

Recommendations:

- (i) Schools Forum members are asked to note the level of maintained school balances recorded at the end of 2023/24. **NOTED**
- (ii) Schools Forum members representing WAPH and WASCL are asked to consider whether to recommend that schools evaluate internally their closing 2023/24 balances. **NOTED**

## 6. DSG High Needs update

Emma Norman presented her report to the forum to illustrate that after discussion with the local authority Deputy Chief Executive (Lynton Green) agreement was reached around changes to the planned spend of the Dedicated Schools Grant (DSG) settlement for Warrington for 2024/25 to ensure that we are in line with current legislation.

Emma noted that last time we looked at different elements of High Needs (HN), areas of historical commitments, transport and support for inclusion. The change in legislation means the DSG should not be funding transport costs. Emma and Paula met with Lynton and it was agreed that £3.5m allocated to transport from HN will now be picked up corporately. The £3.5m will go back into the HN pot and will help support funding for SEND children across the borough. The historical commitments within the Central funding block of £401K were also discussed and will be picked up corporately. It is proposed to allocate the £401K to the growth allocation fund increasing the fund to £643,558 for 2024/25. In view of this, the headroom of £447,135 will go into the HN block to help support increasing pressures.

There is £1.75m support to inclusion, which is a contribution across children's services to support SEND. We are trying to look at how to reallocate into HN and whether it could be put in as a corporate pressure for 2025/26. When looking at 2024/25 it is not confirmed if it can be put in as corporate pressure but is still up for discussion. It is positive that we have £3.5m added to the HN pot and will continue to press for the additional £1.75m to be freed up to go into HN.

Paula and Louise will agree transport costs even though the budget for transport will now be held corporately. Noted that if we are able to invest more in the local offer it will decrease spending on transporting children out of borough and trying to bring more in-house within Warrington.

Questions/Comments:

- Paula noted that this will look like a lot of money coming our way. We legitimately conceded SEND transport to HN and as the ESFA changed the rules without consultation all local authorities had to make decisions to introduce corporate pressures. This has created a problem corporately and challenges for us in the service. It is important to put the £401K into growth allocation as there are real challenges around place planning and sufficiency, although there is only so much we can do with a limited amount of money. With the additional £1.75m if we can get this resolved it will become a corporate pressure. Whilst it is great to bring a bonus into the system it is at a time when we are asked to deliver savings across our services.
- Gary asked if it is going to be difficult for our families to procure transport with the cost pressures within the council. Paula noted that we will always provide where we can and there may be some decisions we have to make about Post 16 for SEN which we don't have to provide but have always provided on a discretionary basis. There may need to be conversations with more parents about paying mileage allowance and encouraging parents use their own cars or use public transport. Perhaps send form if they have car and if can use public transport.

- Paula noted another issue being faced is that people who used to run private hire companies get more money to deliver packages/parcels and are handing in their licenses so we are struggling to get contracts for children. We are looking at any way to release the local authority fleet back into the system, to use for children as well as separately to transport adults to day centres.
- Gary asked if the growth additional fund working party will still be in place. Emma confirmed it would and that the criteria will need to be met. Louise noted that the growth criteria has been in place for over a year now and some primary schools have asked us to consider the criteria again. The funding has largely accommodated secondary growth and we will look to encompass some of our primary schools. The criteria will be tabled at the next growth meeting and James Bancroft is already working on that. Any proposal about the criteria will go back to Schools Forum for approval. Gary noted that the group worked well and was made up of forum members.

The chair asked if everyone was happy with the recommendation to transfer £447,135 from the school's block into the high needs block. Forum members agreed to the transfer and no one objected.

Recommendations:

- (i) It is recommended that School Forum Members note the contents of this report and support the decision to reallocate the headroom transfer of £447,135 from the school's block to further support spending in the high needs block in 2024/25. **NOTED AND AGREED TO THE TRANSFER TO HN**

## 7. Academy Conversions (update)

Felicity Wisken presented her report to the forum to provide Schools Forum with an update on the academy conversion charging model currently being trialled. The report provided a brief overview of two reports from last year for fees associated with academy conversion. The preference was for a flat fee but the local authority took on board concerns and agreed to trial a case by case model using timesheets for specific cost. Today's paper gives an overview of the current position in Warrington schools. There are 45% academies, 5% in the process and 50% yet to convert. The DfE recently updated guidance and a key change from 1 September 2024 is that the £25K grant won't be available to individual schools, instead it will be £75K for groups of three schools. The council therefore expects future requests will come in groups of three.

For the three conversions currently taking place where timesheets are being trialled, two are under the proposed flat fee of £10K (one over £8K and one £8.5K) and one looking at over £12.5K. The conversion specific model has challenges with additional work capturing hours and increased time facilitating conversations when resources are stretched. Capturing this in the Commercial Transfer Agreement (CTA) has presented challenges because of the timeline, a lot of the work happens in the final month or after conversion. Payroll and finance have found it difficult to give a figure given a significant amount of their work is carried out post CTA signature and legal officers work to Solicitors guideline hourly rates (though have striven to offer a discounted rate of £2K per lease and £2K per CTA). In light of the DfE looking to change the model with three or more converting at the same time there is an increased risk that legal will have to outsource work and costs will exceed the £2K per document. There is a preference for simplicity, reducing the amount of time the process takes, allowing officers to focus on the conversion itself. The local authority continues to prefer to move to a fixed fee. Felicity noted that we wanted to give an update on the process of the trial and ask whether forum members thought it would be worth bringing the review forward to before the end of the 12 month trial. One of the three has exceeded the £10K and there is an increased risk others could meet or exceed £10K.

## Questions/Comments:

- Hazel asked if exceeding the £10K was for a church school with land etc. Felicity noted it is a complex site but it is a community school. Although there can be issues around land transactions with faith schools, the issue this time is a community school with a shared site. One model doesn't fit all and complexities can be small or large whether faith or community school.
- Gary asked what timescales are being considered for a review. Felicity noted that sooner rather than later would be best. Some schools are converting on 1 September 2024 so we need to make sure the review is done after that.

The chair proposed for the review to be started in September 2024 and forum members agreed.

It is recommended that Schools Forum:

- (i) Consider the model be reviewed earlier than the original 12 months, seeking a model that is more efficient, less onerous and attempts to overcome the challenges noted in point 4 of the report and/or, **NOTED**
- (ii) Accept that costs may exceed £10K per conversion. **NOTED**

8. **AOB** – no items were brought forward to discuss

9. **Meeting schedule for 2024**

All dates are Tuesdays at 4:30pm–6:30pm via Teams:

- 8 October 2024

**Suggested dates for 2025 were agreed by forum members:**

- 14 January 2025 (face to face)
- 18 March 2025
- 17 June 2025
- 14 October 2025

The chairperson thanked everyone for attending and the meeting was closed.



# REPORT

<b>Report to:</b>	Schools Forum	<b>Item:</b>	3
<b>Date:</b>	08.10.24	<b>For:</b>	Information and discussion
<b>Title:</b>	Membership and Constitution review/implementation		
<b>Author:</b>	Emma Norman	<b>Presenter:</b>	Emma Norman

## 1. INTRODUCTION & BACKGROUND

- 1.1 The purpose of this report is to update Schools Forum on current membership requirements and the vacancies that we currently have.
- 1.2 As Schools Forum, we have to ensure that the forum is representative of the demographic of schools within the borough and that the Forum fairly reflects this within its decision-making powers.
- 1.3 Schools Forum have statutory obligations that are outlined by the Department of Education – and this needs to be updated and reflected within our constitution and Terms of Reference in line with Department of Education updates.

## 2. Membership Requirements September 2024

- 2.1 During the 2023/24 academic year and the start of the 2024/25 academic year six school have converted to Academies.
- 2.2 This has changed what the structure of Schools Forum should look like and is outlined in 2.3.
- 2.3 Below is the data from September 2024 - using May 2024 census data and considering the four academy conversions in August and September 2024.

Sep-24	Number of Pupils	SF member equiv.	
Primary (Maintained)	9,512	5.23	5
Secondary (Maintained)	3,234	1.78	2
Academy	18,672	10.26	10
	<b>31,418</b>		
Primary Academy	8,353	4.59	5
Secondary Academy	10,319	5.67	6
	<b>18,672</b>		

- 2.4 It would be recommended that the 10 academy members are split evenly over the secondary and primaries sector to reflect the rising number of primary schools converting across the borough.
- 2.5 An updated list of members and vacancies can be found in Appendix 1.

### **3. CONSTITUTION REVIEW**

- 3.1 Our Schools Forum constitution had not been reviewed since May 2014.
- 3.2 The document has been reviewed in line with the Department for Education Operational and good practice guide (March 2021), Schools Forum powers and responsibilities – published by the ESFA in March 2020.
- 3.3 The document has been reviewed by Warrington Borough Council legal services team and is now in a place for Schools Forum to review and implement.
- 3.4 **The Constitution can be found in Appendix 2.**

### **4. RECOMMENDATIONS**

- 4.1 Recommendation 1: Agree to have the 10 Academy representatives split into 5 primary and 5 secondary representatives to reflect the increasing number of primary academies across the borough.
- 4.2 Recommendation 2: Review and implement the updated Schools Forum Constitution document.

## Sector Representation (22)

Maintained Nursery School Senior Staff (1)	Primary Headteachers Group	Marcia Atherton
Special School Staff (1)	Special School Headteachers Group	Lucinda Duffy
Special School Governor (1)	Governors Forum	Hazel Coen
PRU (1)	PRU Management Board	Lindsay Regan
Academy All Phases (10) Agreement sought at SF meeting 08.10.2024 Secondary inc. UTC (5) Primary (5)	Academy Schools (Secondary)	Gwyn Williams John Carlin Christian Wilcocks Emma Mills
	Academy Schools (Primary)	Gary Cunningham (Chair Schools Forum 2023) Jane Rooney Sarah Morris Jason Heatley <b>Vacant</b>
	UTC	Chris Hatherall
Maintained Primary School Sector (5)	WAPH & Governors Forum	Siobhan Bentley Andy Hayes Helen Graham Stephen Latham Donna Kendall*
Maintained Secondary School Sector (2)	WASCL	Chris Hunt Ed McGlinchey
Private, Voluntary and Independent Providers (1)	PVI Providers Forum	<b>Vacant</b>

## Non-Sector Representatives (6)

Anglican Diocese	Jane Griffiths
Roman Catholic Diocese	<b>Vacant</b>
16-19 Institutions	Damian McGuire
Parent Governor	<b>Vacant</b>
NEU	Lucie Humphreys
NASUWT	Laura Watson

## Warrington Borough Council

Director of Children's Services	Amanda Perraton
Head of Service – Quality Education and Learning	Louise Atkin
Finance Manager	Janet Davies
Senior Accountant Education	Emma Norman

**Warrington Schools' Forum Constitution**  
**Revisions October 2012 / December 2013 / May 2014 / September 2024**  
**Based on Published September 2012 Regulation**

**1. INTRODUCTION**

- 1.1 The Schools Forum is an independent statutory body established under Section 47A Schools Standards and Framework Act 1998 and is constituted in accordance with 'The Schools Forum (England)(Amendment) Regulations 2005 and 2012.
- 1.2 These Terms of Reference are reviewed and updated as required at the March Forum meeting each year; with membership details being updated at the following June meeting during an election year.
- 1.3 The Forum shall be known as the 'Warrington Schools' Forum'.

**2 PURPOSE OF THE SCHOOLS FORUM**

- 2.1 The main purpose of the Schools Forum is to be consulted by and advise the local authority on issues relating to the funding of schools.

**Advice on proposed changes to the school funding formula:**

- 2.2 The local authority must have regard to the advice of the forum on proposed changes to the formulae they use for determination and redetermination of schools' budget shares.
  - Consulted on funding formula changes, including redistributions (voting restricted to school members plus PVI members).
  - Decides on the movement of up to 0.5% from the schools block to other blocks.

**Consultation on contracts:**

- 2.3 The local authority shall at least one month prior to the issue of invitations to tender consult the Forum on the terms of any proposed contract for supplies or services to be paid out of the school's budget where the estimated value of the proposed public services contract or public supply contract is not less than the specific threshold which applies in relation to Regulation 5 of the Public Contracts Regulations 2015.

**Consultation on financial issues:**

- 2.4 The local authority shall consult the Forum annually in respect of its functions relating to the schools budget, in connection with the following:
  - Arrangements for pupils with special educational needs, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding.
  - Arrangements for use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding.

- Arrangements for early years provision.
- Administration arrangements for the allocation of central government grants.
- Gives a view regarding the Minimum Funding Guarantee.
- Makes a decision regarding de-delegation for mainstream schools for contingencies, the administration of free school meals, insurance, licences, staff costs (supply cover), support for ethnic pupils/under achieving groups, behavioural support services, library and museum services and school performance. Maintained primary and secondary school members will make a decision for their own sector.
- Makes a decision to retain funding for central spending on and criteria for allocation funding from: pre 16 significant pupil growth, falling rolls fund for surplus places in good or outstanding schools where there is a population bulge expected in 2-3 years.
- Decides on central spend on admissions, servicing of schools forum, capital expenditure funded from revenue, combined budgets, centrally funded termination of employment costs, prudential borrowing, funding to enable schools to meet the infant class size requirement, equal pay back places in independent schools for non-SEN pupils, and the contribution to the responsibilities that local authorities hold for all schools.
- Decides the carry forward of a deficit on central expenditure to the next year to be funded from the schools budget.
- Approves the scheme for the financial management for maintained schools.
- Gives a view on the length of membership of the schools forum members.
- Gives a view on membership of non-schools members.
- Determines the voting procedures.
- Elects the Chair and Vice Chair of the Forum.

2.5 The local authority may also consult the forum on any other matters as the local authority sees fit.

### **3 MEMBERSHIP**

3.1 The Warrington Schools Forum membership will be proportionate; with the number of school members broadly reflecting the proportion of pupils within each sector as at 1 September of each year. Pupil numbers as at September 2024 (May census) were:

- Maintained Primary excluding nursery – 9,512
- Academy Primary Excluding nursery – 8,353
- Maintained Secondary – 3,234
- Academy Secondary – 10,319

Schools Forum shall comprise of 23 members appointed on the following basis:

Membership with differentiated voting rights - Total Membership of 28, of whom 23 are entitled to vote on funding formula issues

No	Representing	Appointed by the Council following election by:
1	Maintained Nursery School Senior Staff	Primary Head Teachers Group
1	Special School Senior Staff	Special School Head Teachers Group
1	Special School Governor	Governors Forum
1	PRU Representative	PRU Management Board
10	Academy Representatives	Academy schools inc. UTC
5	Primary School Senior Staff / Governors	Primary Head Teachers Group, Governors Forum
2	Secondary School Senior Staff / Governors	Secondary Head Teachers Group, Governors Forum
1	Early Years, Private, Voluntary and Independent Providers Representative	Early Years Private, Voluntary and Independent Providers Forum
1	16-19 institutions	

At least one member must be a representative from the governing body of a maintained school and at least one must be representative of head teachers from maintained schools.

5 members entitled to vote on matters NOT relating to funding formula issues

No	Representing
1	Anglican Diocese
1	Roman Catholic Diocese
1	Parent Governor
1	NEU (Trade Union)
1	NASUWT (Trade Union)

As per the Schools Forum operational and good practice guidance 2021, membership will be reviewed as a standing agenda item at each meeting.

#### Local Authority Attendees:

The following persons may speak at meetings of the Schools Forum, even though they are not members:

Office	Attendee
Director of Children's Services or representative	Director of Children's Services Head of Service Education
Chief Finance Officer or their representative	Finance Manager Senior Accountant (Education)
Elected Member with primary responsibility for children's services or education in the authority	Portfolio Holder for Children and Young People's Services
Elected Member with primary responsibility for resources of the authority	Portfolio Holder for Corporate resources and assignments
Technical advisers	

Local authority representatives presenting a paper to the Forum may also attend.

- 3.2 The non-school members will constitute a maximum of one-third of the total membership of the Forum to represent relevant bodies as defined in the regulations.
- 3.3 The schools members will be nominated by the relevant head teacher groups (WASCL and WAPH) and the Governors Forum.
- 3.4 School members shall be relevant persons as set out in 3.1 above, who are senior members of staff or governors of schools maintained by Warrington Borough Council and elected by the relevant body. (Senior members of staff are defined as the head teacher, deputy head teacher, assistant head teacher, bursar, or person responsible for the financial management of the school.)
- 3.5 Of the total number of places available on the Forum for school members, there shall be one representative for special schools, and one for nursery schools.
- 3.6 The Council will notify all of its maintained schools of details of any non-school members appointed to the Schools Forum.
- 3.7 Elected members who are members of the Executive Board of Warrington Borough Council and 'relevant officers' of Warrington Borough Council, as defined by the Regulations, may not be members of the Schools Forum.

**Observers:**

- 3.8 The Education Funding Agency (EFA) will have observer status at School Forum meetings to support the local process and to provide a national perspective if members thought it helpful or if there were any concerns about the running of the Forum. The EFA representative will have the right to participate in meetings. The Joint Consultative Committee (JCC) will also nominate an observer to the Forum.
- 3.9 All elected members of the Warrington Borough Council, who are not otherwise members of the Forum by virtue of being elected as governor representatives or non-schools members, shall be entitled to attend and speak (but not vote) at meetings of the Schools Forum.

**Term of Office:**

- 3.10 Members will be appointed to the Forum for two years to ensure primary and secondary sectors and maintained schools and academies are broadly proportionately represented with regard to the total number of registered pupils
- 3.11 The local authority will normally ask the groups or organisations designated to nominate non-school members for a nomination every two years. The nominating group or organisation may ask the local authority to change their nominee at any time.
- 3.12 Any member may resign from the Warrington Schools Forum at any time by giving notice in writing to the Clerk.

**Disqualification:**

- 3.13 The local authority may end the appointment of any member of the Warrington Schools Forum before the end of their term of office if the member concerned ceases to be eligible for appointment to the Schools Forum.

- 3.14 Any member who fails to attend three consecutive meetings of the Forum (even if they have nominated a substitute member to attend) will be asked to resign unless the Schools Forum considers that there are exceptional circumstances that have prevented their attendance.

## 4 CONDUCT OF MEETINGS

### Timing and Frequency of meetings:

- 4.1 Meetings of the Forum will take place on at least four occasions per academic year, however it is likely the volume of business may require meetings to take place more frequently. The local authority will determine the schedule of meetings taking into account any views expressed by the Schools Forum and/or the chair and enabling the Schools Forum to make timely decisions or be consulted on any relevant matter. Meetings can be held remotely or face to face.
- 4.2 Where there is a need for an urgent decision on any matter that falls within the remit of the Forum, the Clerk will convene a special quorate meeting of the Forum, seeking to involve as many members as possible. Where this is not possible, due to exceptional circumstances, the Clerk will send relevant information by email to all members of the Forum, with a response date, and the Chair and Vice-chair jointly will advise the local authority based on the responses received. Their advice must be reported to the next scheduled meeting of the Forum.

### Quorum:

- 4.3 Meetings of the Warrington Schools Forum will be quorate if at least 40% of the total membership of the Forum, excluding any vacancies, is present at a meeting.
- 4.4 The Schools Forum may continue to meet if it is inquorate **but** cannot make a formal decision on any matter set out in sections 2 above. If it continues to meet whilst inquorate it may respond to consultations. Any outcomes from an inquorate meeting will take the form of advice to the local authority.

### Substitution:

- 4.5 Any member may nominate a substitute to attend a meeting and vote if he or she is unable to do so, subject to paragraphs 4.6 to 4.10 below.
- 4.6 A substitute nominated by a member who is a senior member of staff must be a senior member of staff of a school of the same group as the school of which that member is a head teacher.
- 4.7 A substitute nominated by a member who is a governor must be a governor of a school of the same group as the school of which the member is a governor.
- 4.8 A substitute nominated by a member who is a 'non-schools' member must be a member of the 'relevant body' by which that member was nominated.
- 4.9 Notice of a substitute member must be given in writing to the Clerk at least 24 hours in advance of the relevant meeting.
- 4.10 A substitute member may only attend the relevant meeting for which he/she has been nominated.



### **Voting:**

- 4.11 It is expected that most decisions of the Forum will be by consensus. If a vote is required, the decision will be by simple majority of those voting. The Chair of the Forum will exercise a casting vote in the event of a tied vote.
- 4.12 Generally, only members (both school and non-school) may vote. On matters regarding schools funding, only schools' members and the PVI representative may vote. On matters regarding the de- delegation of centrally retained funding, voting is on a sector basis for maintained school representatives only.

### **Chair/Vice-Chair:**

- 4.13 The Warrington Schools Forum shall elect a Chair and Vice-Chair bi-annually in February/March each year. The Chair will be elected every 2 years from 2023, and the Vice Chair elected every 2 years from 2024.
- 4.14 In the event of a casual vacancy occurring in the office of Chair or Vice-Chair, the Schools Forum shall elect one of their number to fill that vacancy for the remainder of the current term of office as Chair or Vice-Chair.
- 4.15 A Chair or Vice-Chair shall cease to hold office if they resign by giving written notice to the Clerk, or if they cease to be a member of the Schools Forum.

### **Interests:**

- 4.16 Members of the Schools Forum should declare an interest in any individual matter which directly affects a school of which they are a governor, head teacher or other employee **except** where that interest is no greater than the interest of the generality of schools maintained by the local authority.
- 4.17 Consistent with the principles set out above, any member with such an interest should withdraw from the discussion and take no part in the decision.
- 4.18 Where it is clear that a decision in which a member has such an interest is likely to arise at a particular meeting, the member concerned may wish to nominate an appropriate substitute to attend the relevant meeting in accordance with 4.5 – 4.10 above.

### **Right of attendance at meetings and confidentiality:**

- 4.19 Meetings of the Forum shall normally be open to the public except that the public may be excluded for the consideration of confidential business. These items will usually be taken at the end of the agenda and shall be agreed when the agenda is set. Visitors will be asked to leave if confidential items are discussed, unless the Forum have asked them to take part in the specific discussion.
- 4.20 Observers have the right to attend and speak at meetings of the Warrington Schools Forum, however they do not have a vote. This includes officers of the local authority and elected members who are not members of the Forum through their capacity as school governors or other representative position.

4.21 Members of the Forum are representing their group/body on the Forum and therefore it is anticipated that they may consult more widely within their group on issues arising through the work of the Forum. There may be circumstances where this is not appropriate and where this is the case it will be clearly agreed at the meeting and documented. This also applies to the work of sub-committees/working groups.

4.22 The Forum will decide if an item of discussion is confidential. The minutes of any parts of the meeting that are confidential should be kept separate and not made available for inspection with the rest. Members should respect the confidentiality of items of business which the Forum agrees are confidential.

## 5 **APPOINTMENT OF WORKING GROUPS/SUB COMMITTEES**

5.1 The Schools Forum may establish sub-committees or working groups for the purpose of exercising any of its functions. The terms of reference of such groups/sub-committees shall be determined by the Forum and cover issues of confidentiality and administrative support.

5.2 Any recommendation or decision of a sub-committee or working group must be approved by a quorate meeting of the Schools Forum before it becomes effective unless the Schools Forum has previously agreed otherwise.

5.3 Meetings of the sub-committees and working groups shall normally be open to the public except that the public may be excluded for the consideration of confidential business.

## 6 **ADMINISTRATION**

6.1 The Director of Children and Young People's Services will nominate a Clerk to the Warrington Schools Forum.

6.2 The Clerk shall convene all meetings of the Committee but shall comply with any direction in the matter given by:

- (i) The Schools Forum at a previous meeting; or
- (ii) The Chair or, in his/her absence, the Vice-Chair so long as this is not inconsistent with any previous direction given under (i) above.

6.3 The clerk shall issue a notice and agenda for each meeting to every member of the Forum at least five days before the meeting.

6.4 The Clerk shall keep a record of the proceedings of each meeting in the form of minutes. The minutes will be open to public inspection except where the Forum resolves that a matter is confidential and should be excluded from publication.

6.5 The Forum shall, as soon as reasonably possible, make available the minutes of meetings of the Schools Forum to the chair of governors and head teacher of all relevant schools as soon as possible after each meeting.

### **School Forum Reports:**

6.6 A Schools Forum report is expected to:

- Include the author's contact details so that they can be contacted for further information before the meeting

- Be presented at the Schools Forum by the author or representative
- Be presented in a consistent template to encourage familiarisation of data and ease decision making

6.7 Four definitions will be used in recommendations for reports:

- (i) **Approve** – a decision is to be made by the Schools Forum within its constituted powers
- (ii) **Comment** - the local authority is consulting the Schools Forum e.g. options are being explored with a view to leading to a specific proposal
- (iii) **Agree** – there are specific proposals, before a local authority formal decision
- (iv) **Note** – any reports purely for interest that may have a bearing on future issues or developments

6.8 As the Schools Forum is a funding decision making body, it is imperative that the financial analysis included within the reports is robust. As such, the following checks will have been undertaken before any reports are issued to the Schools Forum for consideration:

- Are there stakeholders who would have a view on this funding decision? Their views should be sought before the report is finalised and their feedback detailed in the report. Stakeholders could be head teachers, governors, local authority officers policy groups, steering groups etc.
- What are the options for allocating the DSG funding? Have all of the options been detailed? Where an approach is recommended, this should be clearly explained.

6.9 How does this funding decision change previous funding levels? Could transitional protection be applied? If so, at what level, for what period of time and how much will this cost?

- Has the wider impact on schools or the services provided to schools been considered? Is there a knock on effect of this funding decision that will impact on other provision?
- Has local or national research regarding this funding decision been taken into account? Is this referenced in the report?
- Have both revenue and capital costs been taken into account and shown clearly in the report?
- How will the funding decision impact on outcomes for children and young people in Warrington?
- How does this funding decision relate to the priorities of the Local Authority?
- How does this funding decision relate to any regional working?
- How does this funding decision relate to the national DSG funding direction?
- What is the impact of the funding decision on the relationship between the Local Authority and schools?

6.10 There is an expectation that Forum members would have read all the papers before attending Schools Forum. This will allow officers to pick up the salient issues of reports rather than going through them a paragraph at a time. This will allow more time for Forum members to focus any parts of a report which are unclear and expedite decision making.

## 7 BUDGET/MEMBERS EXPENSES

7.1 All expenses of the Warrington Schools Forum shall be met from a budget agreed annually by the Schools Forum and charged to the schools budget.

## 8 AMENDMENTS TO THE CONSTITUTION

- 8.1 The Schools Forum shall review the constitution every four years or sooner if the need arises.
- 8.2 The constitution must comply with the relevant legislative requirements and any review shall take into account the requirement that the total number of representatives of both primary schools and secondary schools shall have regard to the total number of pupils in each phase.

Constitution Reviewed	10 March 2009
Amended	12 March 2009; 18 May 2010, 24 January 2012, August 2012, September 2012, October 2012, 28 October 2012, December 2013, May 2014, September 2024
Tenure of Chair	Ends June 2025 – Gary Cunningham
Tenure of Vice Chair	Vacant
Tenure of members (generally)	Two years from appointment – membership provided at each meeting.

- 8.3 This document was written in September 2024 to consider the constitution of Schools Forum in light of legal duties.

## 9 GUIDING PRINCIPLES ON FAIRNESS

- 9.1 At its meeting on 8th October 2013, the Warrington Schools Forum adopted the following guiding principles on fairness.
- 9.2 To ensure fairness in school funding allocations, Warrington Schools Forum members will:
- 9.2.1 have regard to the impact of proposed changes in the funding formula on all sectors and schools in Warrington.
  - 9.2.2 seek to understand this in detail through modelling options and variations in the formula.
  - 9.2.3 over time, arrive at a clear and shared understanding of the needs of individual schools based on appropriate data.
  - 9.2.4 test the fairness of all decisions by considering the impact on schools and sectors.
  - 9.2.5 have regard to the views of those representing sectors other than their own.
  - 9.2.6 seek the views – both individually and collectively - of the constituent schools that they represent and communicate decisions to them.

# REPORT

<b>Report to:</b>	Schools Forum	<b>Item:</b>	4
<b>Date:</b>	08.10.24	<b>For:</b>	Information and discussion
<b>Title:</b>	School Funding 2025-26 / Maintained School Deficit Budget Management		
<b>Author:</b>	Emma Norman	<b>Presenter:</b>	Emma Norman

## 1. INTRODUCTION & BACKGROUND

- 1.1 The purpose of this report is to update Schools Forum on the current situation regarding schools funding 2025/26 and the Core School Budget Grant and in response to the updates request an extraordinary meeting in Autumn Term 2.
- 1.2 As a Local Authority, we have also been working on some formal procedures to support maintained schools with a deficit budget, in response to this a draft policy has been put together for review and comment from the maintained sector.

## 2. SCHOOL FUNDING 2025-26

- 2.1 On the 31<sup>st</sup> July the ESFA reported that DSG budgets for 2025/26 were still to be agreed; including the 2025/26 core schools' budget which, as usual, the DfE will need to agree across government. They have stated that they know how important these decisions are to schools and are working across government to make them available as soon as practicable.
- 2.2 We are, based on current announcements, expecting a single year budget for 2025/26 to be announced in late October with a three-year pending review published in spring 2025.

## 3. CORE SCHOOL BUDGET GRANT (CSBG) 2024-25

- 3.1 On the 31<sup>st</sup> July the DfE announced additional 2024/25 funding would be paid to schools through a Core School Budget Grant (CSBG). The CSBG allocates £1.1 billion from a total of almost £1.2 billion of extra funding (DfE are providing £97 million in respect of schools delivering post-16 and early years provision).
- 3.2 The CSBG is to support schools with overall costs, including costs of the 2024 teachers' pay award and the support staff pay offer in 2024/25. CSBG is in addition to the existing teachers' pay additional grant (TPAG) for 2024/25, which was introduced to help cover costs from the 2023 teachers' pay award.
- 3.3 The Education and Skills Funding Agency (ESFA) has published the core schools budget grant (CSBG) methodology. The methodology sets out the funding rates

which will be used, and how the CSBG will be allocated to mainstream, special, alternative provision and hospital schools, and to local authorities for their centrally employed teachers, for the period September 2024 to March 2025. The ESFA have also published a separate calculator tool for mainstream schools. CSBG-Mainstream-School-Calculator

3.4 The CSBG covers the first seven twelfths portion of the award for the 2024/25 financial year. The DfE will be considering the impact of the full year's costs of the teacher pay award on schools when considering 2025/26 budgets (as well as any appropriate arrangements for academies in the period April to August 2025).

3.5 The nationally announced CSBG 2024/25 Funding Rates are as follows:

**Mainstream base funding rates:**

- a basic per-pupil rate of £76 for primary pupils, including pupils in reception
- a basic per-pupil rate of £108 for key stage 3 pupils
- a basic per-pupil rate of £122 for key stage 4 pupils
- a lump sum of £2,900
- a FSM6 per-pupil rate of £70 per eligible primary pupil
- a FSM6 per-pupil rate of £100 per eligible secondary pupil

The funding for mainstream schools will be incorporated into core budget allocations for 2025/26, by being rolled into the schools national funding formula (NFF) for 2025/26. The usual appropriate arrangements will also be put in place for academies, to cover the CSBG in the period April to August 2025, given their funding cycle follows the academic year.

**Special and AP Schools funding rates:**

The funding rate for special and alternative provision schools will be £610 per place. A first allocation using the published SEND and AP place numbers will be made in September 2024

A second updated allocation will be made in March 2025 based on the updated 2024/25 place numbers.

**Centrally employed teachers:**

Teachers categorised as centrally employed on the schools' workforce census 2023 will be funded on a per teacher basis at £2,428.

CSBG 2024/25 allocations are expected to be published in September along with the conditions of grant document. Payments to local authorities will be in November and to academies in December.

**Area Cost Adjustment (ACA)**

All funding rates will be uplifted by the Area Cost Adjustment (ACA) for the local authority area to take account of geographical variation in labour costs. The ACA uplift rate for Warrington is 1.00377.

## **Early Years Budget Grant (EYBG)**

Additional funding for early years settings will be distributed through the early years budget grant (EYBG), reflecting the methodology used in the early years teachers' pay grant (EY TPAG) in 2023-24. More information on EYBG will be published by the DfE in due course.

## **Post 16**

Further information will be published in due course about how funding will be distributed to schools that teach post-16 students.

### **4. EXTRAORDINARY MEETING REQUEST**

- 4.1 In light of the delay in receipt of any indicative DSG budgets we would like to request a meeting on Tuesday 3<sup>rd</sup> December 2024 to present information on 2025-26 indicative DSG, and de-delegated budgets.

### **5. MAINTAINED SCHOOLS DEFICIT BUDGET MANAGEMENT**

- 5.1 We are proposing putting into practice some formal procedures to support school leaders with deficit budgets and prevent further schools from entering a deficit budget situation.
- 5.2 The attached documents in Appendix 1 and Appendix 2 of this report are in draft form and are currently being reviewed by the Section 151 officer.
- 5.3 At current, processes have been informal, and results have been mixed with some schools working extensively to turn around their budget position, others have seen the position worsen.
- 5.4 The purpose of the policy and procedure is to enable formal agreements to be in place to support school leaders in making the best decisions whilst preventing budget deficits, and for those with deficits, recovering those as soon as is practicable and in line with DfE guidance.
- 5.5 Maintained members are asked to review and consider the documents, providing any feedback to the Senior Accountant.

### **6. RECOMMENDATIONS**

- 6.1 Recommendation 1: Note the updates in Section 2 & 3
- 6.2 Recommendation 2: Agree the date for the extraordinary meeting
- 6.3 Recommendation 3: Maintained schools review the attached appendices for deficit budget management and provide any feedback to the Senior Accountant.



# WARRINGTON

## Borough Council

### Deficit Recovery Procedure for schools

2024-25

Corporate Services – Families and Wellbeing Finance Team

July 2024



Title	Page nos
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School licensed application form (Appendix A)	8
Checklist and areas of question (Appendix B)	12
LA review of deficit application form (Appendix C)	17

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## **INTRODUCTION**

- 1.1 This is a supplement to the current Warrington Borough Council Scheme for Financing Schools (updated April 2024) and the Schools Financial Regulations, which requires schools to maintain a balanced budget. However, these regulations also recognise that circumstances may mean that it is not always possible for schools to maintain a balance budget and therefore schools may find themselves in financial difficulty.
- 1.2 A school is defined as being in financial difficulty when either or both of the following circumstances occur:
  - If the school plans to be in a cumulative deficit in the current financial year when setting its annual budget.
  - If the school forecasts that it will be in a cumulative deficit in the current financial year following an in-year review of its budget unless remedial action is undertaken.
- 1.3 In this situation, provision is made for the Local Authority to agree a Licensed Deficit with the school. A Licensed Deficit is an agreement between the school and the Local Authority, whereby, the school specifies the actions it proposes to take to return its budget to a balanced position as well as timescales for their implementation. This is known as the Recovery Plan.
- 1.4 This procedure covers Schools who have a long-term Recovery Plan. Section 8 of this document describes the approach for schools with a small one-off deficit.

## **2 IDENTIFICATION OF FINANCIAL DIFFICULTY**

- 2.1 Early identification of potential financial difficulties is the key to successfully recovering a deficit, followed promptly by consideration of what actions are needed to return the schools budget to a long term financially balanced position.
- 2.2 The process should start by the school formally notifying the Local Authority as soon as possible that as a result of internal budget setting or monitoring, it is planning or forecasting a cumulative deficit position and is in financial difficulty.
- 2.3 Notifications should be sent to [finance-centralreports@warrington.gov.uk](mailto:finance-centralreports@warrington.gov.uk) and addressed to the Director of Corporate Services. This notification should acknowledge the situation and seek an early meeting with the Local Authority to discuss. If following the meeting the Local Authority agree that school is in financial difficulty a Licensed Deficit should be applied for.

## **3 LOCAL AUTHORITY ROLE IN EARLY IDENTIFICATION OF FINANCIAL DIFFICULTY**

- 3.1 The Local Authority has its own arrangements to monitor school budgets based on the reporting requirements in Schools Financial Regulations. Based on these arrangements, the Local Authority may detect that a school is in financial difficulty, and has neither notified the Local Authority, nor has an existing Licensed Deficit in place.

- 3.2 The Local Authorities monitoring process will include a review of 3 year budget projections for all schools, this will involve reviewing current cost uplifted for inflation and income based on pupil projections, which will highlight early warning of schools which will have a potential financial problem. This can prompt an initial conversation with affected schools so they can plan for early action to avoid a potential problem. This is can often be managed through natural staff wastage/temporary contracts rather than compulsory redundancy. If left the financial problem becomes bigger and is more difficult to address.

#### **4 APPLICATION FOR A LICENSED DEFICIT**

- 4.1 To apply for a Licensed Deficit, schools must write formally to the Director of Corporate Services and Director of Children's Services via ([finance-centralreports@warrington.gov.uk](mailto:finance-centralreports@warrington.gov.uk)) prior to:
1. Approving their annual budget, any application should be received by no later than 30 April so it can be considered prior to the school setting its budget by the required deadline of 31 May, or
  2. When subsequent budget changes following an updated review of the budget shows that school will produce a cumulative deficit by the end of the current financial year.
- 4.2 The formal notification must include a completed Schools Licensed Deficit Application (Appendix A) detailing the following information:
1. Forecast financial position and number of pupils
  2. Reason(s) for deficit
  3. Actions required to achieve recovery
  4. Highlight any risks and the steps taken to mitigate these risks
  5. Highlight any educational impact/implications
  6. Monitoring of deficit and timescales to achieve recovery
- 4.3 Applications for a Licenced Deficit must also include a Recovery Plan. Further information on Recovery Plan are included in Section 4.

#### **5 DEVELOPING A RECOVERY PLAN**

- 5.1 The ultimate responsibility for developing a Recovery Plan lies with the Headteacher and the Governing Body of the school. When formulating a Recovery Plan, it is vital that the school engages with its financial support partner at an early stage in the process. Each school has its own arrangement for financial support.
- 5.2 It is also recommended that school consider involvement from other contacts in the development of the Recovery Plan, for example, their **Associate for School Improvement (ASA)?** to ensure that educational standards are not compromised or Human Resources if employment issues are involved.
- 5.3 Every school will have its own unique circumstances, but in working through the process of developing a Recovery Plan, the school and its advisers should look to

review and consider a wide range of issues. Appendix B provides an example of a completed Recovery Plan and suggested format.

- 5.4 Appendix C provides a checklist and questions of key areas which Schools Leaders should consider when developing their Recovery Plan. School Leaders should note the checklist broadly corresponds to the issues to be included in the ultimate application to the Local Authority for a Licensed Deficit and Deficit Agreement, and the criteria the Local Authority will use to consider the application.
- 5.5 The Governing Body should formally consider and endorse the Recovery Plan prior to submission to the Local Authority. The over-riding consideration is to develop a plan that:
1. Returns the school to a sustainable position of cumulative surplus as soon as possible.
  2. Does not compromise educational standards.

## **6 LICENSED DEFICIT AGREEMENT**

- 6.1 The Local Authority will ensure that the plan is reasonable and that actions included in the recovery plan are realistic and will generate the required level of savings. Any areas that are unclear or not achievable will be queried with the school.
- 6.2 Schools will then receive Licensed Deficit Agreement Form from the Local Authority (Appendix D). The Agreement Form will be signed by the Local Authorities Section 151 Officer or their nominated deputy. The Licence Deficit will only be activated when the Headteacher and the Chair of Governors sign the form on behalf of the school and return the original agreement form.

## **7 LICENSED DEFICIT MONITORING**

- 7.1 Schools Leaders and Governors are responsible for the completion, implementing actions, monitoring and reviewing of the Recovery Plan. This should be a standing agenda item for the meeting and copies of the minutes should be submitted to the Local Authorities Finance Team via [finance-centralreports@warrington.gov.uk](mailto:finance-centralreports@warrington.gov.uk)
- 7.2 The school must submit regular updates to the Recovery Plan at termly intervals until the schools returns to a surplus position. Any significant deviation should be reported to the Local Authority as soon as possible and a revised action plan to get back on track within the existing agreement.
- 7.3 Any amendments to the signed Agreement Form, Recovery Plan or other documentation must be approved by the Local Authority.
- 7.4 The Local Authority will also monitor any significant deviation from the signed Agreement Forms and other documentation via Recovery Plan meetings, which will be held once every term, however these will be arranged in line with individual school issues.

- 7.5 If the school returns to a cumulative surplus, then the License Deficit will be formally declared expired, and the Local Authority will notify the school in writing.

## **8 LOCAL AUTHORITY INTERVENTION**

- 8.1 It is essential for the Council to fulfil its responsibility of ensuring that its role of monitoring and intervention under the Warrington Scheme of Financing Schools (the Scheme) are appropriately discharged. The Council has a responsibility to support maintained schools in complying with finance regulations and the improvement in the financial management and performance of Warrington schools.

- 8.2 The Council is proposing the following plan of intervention in these areas.

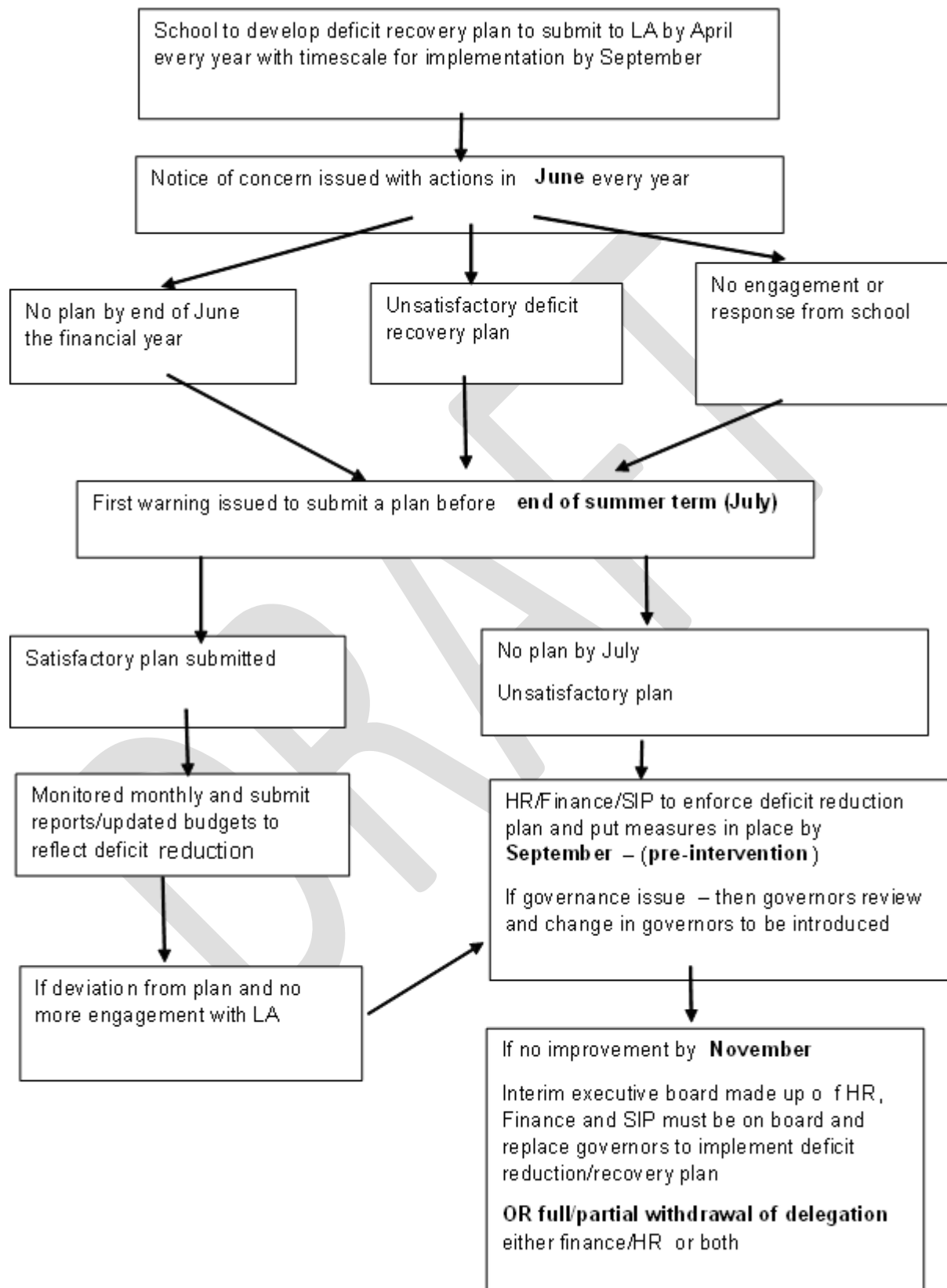
1. Continuous decline in pupil numbers, with no sign of increasing and making the school financially unsustainable.
2. Schools have been unable to develop a deficit recovery plan within the set timescale for implementation; (the beginning of the academic year – September)
3. Lack of engagement from the governing body and headteacher with LA finance and Education services

- 8.3 The Local Authority will exercise its powers to take back control of the school budget and seek to take the necessary action to return the school to a financially balanced position before returning control to the Governing Body.

- 8.4 During the suspension of delegation school staff would be responsible to the Local Authority for the day-to-day financial administration in the school. Depending on the severity of deficit, further actions may be required.

The process of interventions is illustrated below.

**Process of interventions – to be implemented 1 September 2024**



## **9 SCHOOLS WITH SMALL ONE OFF DEFICIT**

- 9.1 It is recognised that some schools may have incurred or are projecting to incur a small deficit as at 31 March each year but will recover from that the following year and return to surplus. Therefore, any school either currently with or projecting a deficit at the end of the financial year of the greater of £20,000 or 1% of the school budget allocation and can clearly demonstrate they will return to a surplus the following year does not need to undertake the full deficit recovery process outlined above.
- 9.2 Any schools in this position should email [finance-centralreports@warrington.gov.uk](mailto:finance-centralreports@warrington.gov.uk) outlining their financial position with a copy of their three year budget showing the schools return to a surplus position within 12 months and giving a brief explanation of the reason the school has incurred a small deficit.

**APPENDIX A**

**SCHOOL LICENSED DEFICIT APPLICATION**

This application should be completed by the Governing Body and Headteacher after the school has notified the Local Authority Finance Team of their financial difficulties and worked to identify a realistic and achievable Recovery Plan. Guidance notes and procedures to assist with completion are attached.

**School Name:**

**Date of Application:**

A copy of the Three Year Plan (Form 1) must accompany this application form.

	<b>Outturn</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>
	<b>2023/24</b>	<b>2024/25</b>	<b>2025/26</b>	<b>2026/27</b>
Three Year Plan Balances	£	£	£	£
Forecast October Pupil No's				

Schools are expected to achieve recovery by the end of year 3. In exceptional circumstances only the Local Authority may agree a recovery over a 3 year period.



The completed application must be returned no later than **30 April** or as soon as a cumulative deficit is identified in year.

**Reason(s) for Deficit** – Please provide a full description of the circumstances leading to the schools current and forecast cumulative financial position. Reasons for this can include changes in pupil numbers, unexpected/unforeseen expenditure, changes in staffing requirement.

**Actions required to achieve recovery** – Please set out the main action points included in the Recovery Plan. You must clearly show how repayments are to be funded (e.g. details of savings to be made or identified increase in income and how much of the deficit is to be repaid each financial year until the deficit is met in full). Where staff reduction/reallocation is required, you must provide costings of the current staffing structure and of the revised structure clearly identifying additional one-off costs and the planned savings to be achieved.

**Highlight risks inherent in proposed actions and steps to minimise the impact of these risks.**

**Educational Impact/Implications** – Please explain how the school intends to manage standards/key stage results/school moral whilst implementing budget reductions. Please provide SFVS dashboard benchmarking data and identify any areas that will be examined as part of your recovery plan.

**Monitoring and timescales** – Please explain how you intend to monitor your Recovery Plan, who will be responsible for monitoring and reviewing progress, clearly identifying the timescale and dates.

**During the period of the Licensed Deficit the Local Authority expects school and Governors to:**

- Implement the listed actions in order to achieve the required savings within the timescale agreed.
- Implement additional savings for any unplanned spend for exceptional items to ensure that the agreed deficit balance is not exceeded.
- Use unplanned additional incomes/savings to reduce the deficit unless ring-fenced.
- Notify the designated Finance Advisor of any potential deviation to the recovery plan balances at the earliest opportunity.
- Consult with the designated Finance Adviser prior to advertising any staff posts.
- Support the designated Finance Advisor by providing the information to produce termly reports to Warrington Borough Council’s Finance Team in accordance with agreed timescales.
- Provide any other information as and when required by the Local Authority.

Headteacher Name:		Date:	
Headteacher Signature:			
Chair of Governor’s Name:		Date:	
Chair of Governor’s Signature:			
Date of the full Governing Body Meeting approval:			

**Please return this form to: [finance-centralreports@warrington.gov.uk](mailto:finance-centralreports@warrington.gov.uk)**

**APPENDIX B**

**CHECK LIST AND QUESTIONS FOR KEY AREAS FOR SCHOOLS IN FINANCIAL DIFFICULTY**

<b>Area</b>	<b>Considerations</b>
<p><b>Understanding the deficit</b></p> <p>It is important that School Leaders understand what the key issues are driving their deficit why it has occurred. Leader should consider:</p>	<p>Is the deficit one off, due to a single event or a permanent, longer term, underlying issue?</p> <p>Is the deficit due to an increase in expenditure, a reduction in income or maybe both?</p> <p>What are the reasons for the deficit?</p> <p>This could be due to several factors for example: -</p> <p>Has there been a reduction in pupil numbers, if so, why, and are there any actions School Leaders can take to address, such as marketing strategies?</p> <p>Has there been a rise in SEND demand?</p> <p>Have premises costs risen?</p> <p>Does school have an ageing building, is this a contributing factor?</p> <p>Does school have any capital funding it could utilise effectively to avoid costs?</p>

<p><b>Budget and forecasting</b></p> <p>It is important that both the budget and forecast are based on the most accurate and latest information available. A budget is a plan, the forecast is a way of measuring against the plan.</p>	<p>A zero based budgeting exercise should be complete, this means Schools Leaders should avoid using previous years budgets and adding inflation, starting with a blank page often generates savings and is a good away of understanding what the budget is made up of.</p> <p>School budgets should tie into School Development Plans, Ofsted assessments and identify school priorities.</p> <p>Schools leaders need to ensure forecasting accurate, up to date and robust for both income and expenditure, for example, have both internal and external factors been reflected in the forecast, for example, the latest policy announcements/changes both locally and nationally?</p> <p>School Leaders will be aware pupil numbers are a significant factor in school budgets, are these accurately reflected in budgets particularly for future years?</p> <p>Are there any financial implications on the actions from the Recovery Plan which need to be reflected in future years, for example, any invest to save scenarios?</p> <p>Have all external funding opportunities been explored and maximised?</p> <p>Are there any grants available to schools, or is there any opportunities to generate income for example, lettings, or other sources of external income?</p>
<p><b>Bench marking</b></p> <p>School Leaders should consider using data to explore savings and efficiencies.</p>	<p>Completion of a bench marking exercise should be complete comparing to statistical neighbouring schools to consider whether school's expenditure pattern differ significantly from others of similar size and profile of need. This may inform the areas where savings can be achieved.</p>

	<p>This should include an analysis of use of staffing and consideration of alternative ways of organising the school (see Staffing Section below).</p> <p><a href="https://schools-financial-benchmarking.service.gov.uk">Schools Financial Benchmarking - GOV.UK (schools-financial-benchmarking.service.gov.uk)</a></p>
<p><b>Staffing</b></p> <p>Staffing costs can equate to between 75 - 85% of school budgets, so it is important to maximise value for money and ensure that staff are working as efficiently as possible.</p>	<p>School Leaders should consider:</p> <p>Teaching costs – Does school have a lot of experienced high costs teaching staff/Is the balance at the correct level?</p> <p>Reviewing all staffing ratios, including FTE's, Pupil / Teacher Ratio, Pupil / Teaching Assistant Ratio – are these above average/excessive, if so, why?</p> <p>How many staff have teacher learning responsibility are they all required?</p> <p>Could planning, preparation assessment (PPA) time be managed differently or are there alternative options?</p> <p>School leader should consider a review of non-teacher duties and leadership time for example, would the Deputy Headteacher have capacity to cover PPA?</p> <p>Are support staff suitably qualified for their roles and do they add to the educational offer school provides?</p>

<p><b>Vacancy Management</b></p>	<p>Leaders should consider whether recruitment is essential, could recruitment be delayed generating one-off savings?</p> <p>When recruiting School Leaders should decide whether to recruit on a permanent basis or would fixed-term contracts be more appropriate?</p> <p>Is there any natural wastage for example potential upcoming retirements, or maybe temporary savings such as maternity leave?</p> <p>Consideration should be given to any additional costs such as redundancy and pension costs as well as whether any savings generated from vacancies are temporary or permanent.</p>
<p><b>Risks and Monitoring arrangements</b></p>	<p>Has the school identified the risks inherent in their proposed actions, and what steps have been put into place to minimise the impact of these risks?</p> <p>What specific monitoring arrangements have been put into place so that the Governing Body can monitor the successful fulfilment of the recovery plan?</p> <p>Of the proposed actions identified are they specific, measurable, realistic, achievable and time bound?</p>
<p><b>Others</b></p>	<p>School Leaders should consider class structures and understand the rationale, is a review class sizes needed and are there alternatives options?</p> <p>Sharing resources (including staffing) with other neighbouring schools, are there opportunities to learn together, increasing partnership working, and share best practice?</p>

	<p>Is there scope to negotiate contracts and/or review SLA's?</p>
<p><b>Education, Health and Care plans (EHCP)</b></p>	<p>The LA SEND team and Finance can review and discuss with schools on a case by case basis the following;</p> <p>% of EHCP numbers per school population</p> <p>Level of complexities</p> <p>review the financial picture</p>
<p><b>Peer to peer support</b></p>	<p>Headteacher support</p> <p>School Business Manager</p> <p>Chair of Governors</p> <p>These are for the schools who require support from those who have gone through the process</p>



**APPENDIX C**

**LOCAL AUTHORITY REVIEW OF LICENCED DEFICIT APPLICATION /  
AGREEMENT FORM**

**School Name:**

**Date of Licenced Deficit:**

A completed copy of the application form will be sent to the school as formal confirmation of Local Authority approval.

Strategic Lead Finance Comments:

Signature:

Date:

Director of Corporate Services comments:

Signature:

Date:

Director of Children's Services Comments:

Signature:

Date:

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<b>FORMAL LA APPROVAL OF LICENSED DEFICIT APPLICATION</b>	
Additional Restrictions (if any):	
S151 Officer:	Date:
Director of Children Services:	Date:

**Acceptance of this agreement by the school**

Headteacher's Signature:		Date:
Name:		
Chair of Governor's Signature		Date:
Name:		

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# WARRINGTON

## Borough Council

## Schools in Deficit – Interventions process

Service area – Corporate Services – Families & Wellbeing Finance Team and Education services

July 2024

## Contents

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# 1 Purpose

## 1.1 Purpose

The purpose of this procedure is to set out the interventions approach in a clear and transparent manner that Warrington Borough Council will take to address the financial deficits of schools.

This procedure is intended to help schools understand the interventions that will be adopted from July 2024 in conjunction with the schools in deficit recovery procedures.

## 1.2 Background

The finance team has developed deficit recovery procedures, agreed by Warrington Borough Council School's Forum, which clearly sets out the process for schools going into deficit or have already accumulated a deficit. Any budget deficit at the time of conversion from a maintained school to a sponsored academy remains the responsibility of the local authority and will transfer to the Council and is therefore funded from the general fund, which has posed a financial risk to the Council.

It is essential for the Council to fulfil its responsibility of ensuring that its role of monitoring and intervention under the Warrington Scheme of Financing Schools (the Scheme) are appropriately discharged. The Council has a responsibility to support maintained schools in complying with finance regulations and the improvement in the financial management and performance of Warrington schools.

The Council is proposing the following plan of intervention in these areas

1. Continuous decline in pupil numbers, with no sign of increasing and making the school financially unsustainable;
2. Schools have been unable to develop a deficit recovery plan within the set timescale for implementation; (the beginning of the academic year – September)

3. Lack of engagement from the governing body and headteacher with LA finance and Education services

The deficit recovery procedures has already stated the stage of intervention with this procedure outlining a clear approach of intervention and process of withdrawal of delegation or interim arrangements.

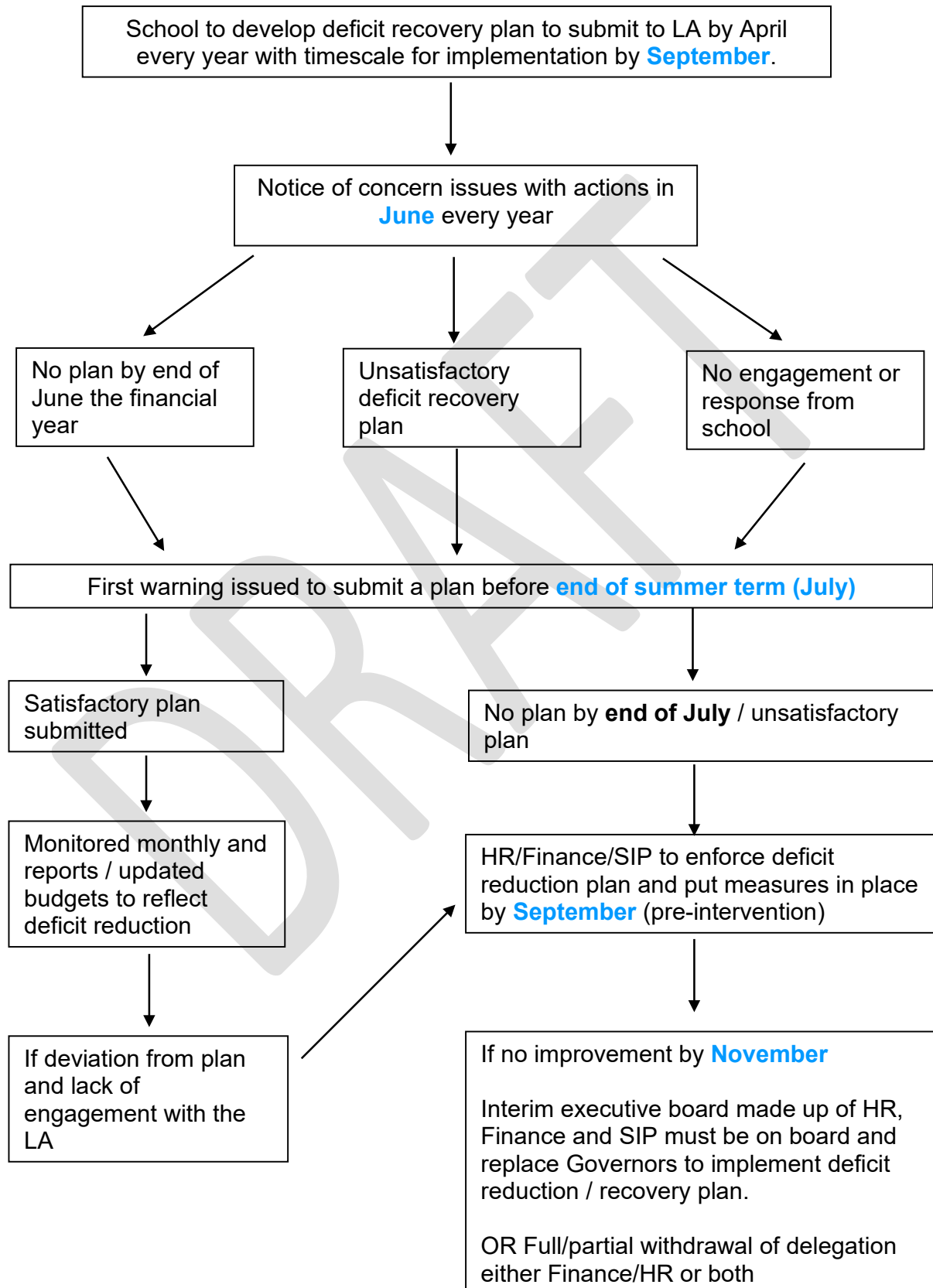
This procedure has outline interim arrangements for those schools that remain in deficit and considered high risk as these may require more significant intervention by the Council to safeguard its financial position and that of the school.

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## 2 Process of Interventions

### Process of Interventions – to be implemented 1 April 2025

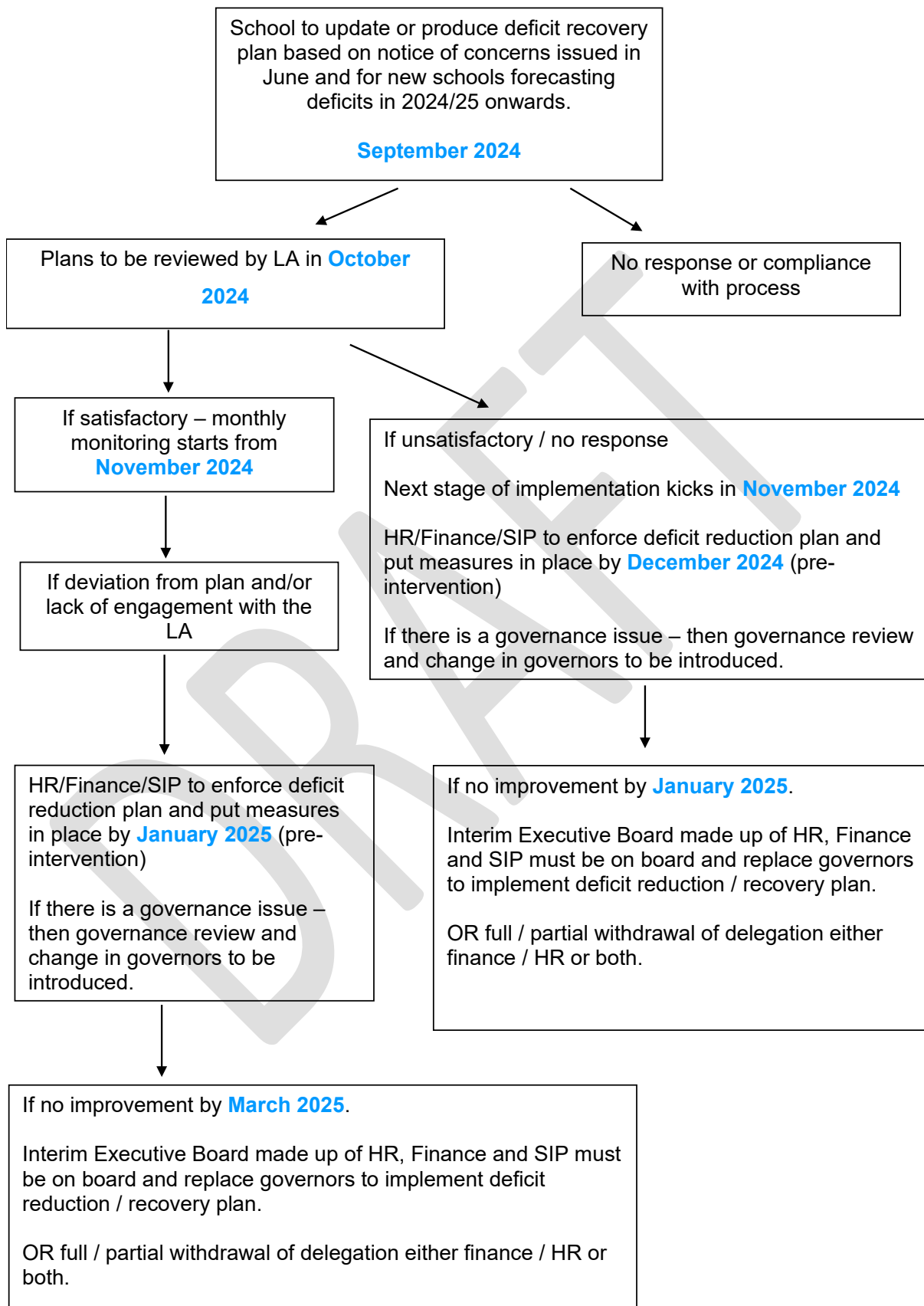


### 3 Interim arrangements

These arrangements have been introduced in the short term for those schools that remain in deficit and considered high risk as these may require more significant intervention by the Council to safeguard its financial position and that of the school. These have been highlighted below;

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Interim arrangements from 1 September 2024 – 31 March 2025



# REPORT

<b>Report to:</b>	Schools Forum	<b>Item:</b>	5 (a)
<b>Date:</b>	08.10.24	<b>For:</b>	Information and discussion
<b>Title:</b>	Allocation of the High Needs funding Block for 2024/2025		
<b>Author:</b>	Louise Atkin	<b>Presenter:</b>	Louise Atkin

## **1. INTRODUCTION & BACKGROUND**

- 1.1 Warrington’s Integrated SEND Strategy sets out the vision and priorities for partners to work towards ensuring that children and young people with SEND have access to the right services at the right time. Priorities are rooted in the SEND Code of Practice launched in 2014.
- 1.2 Like other Local Authorities since the introduction of the Code of Practice in 2014 and the impact of the COVID pandemic, Warrington has experienced a significant pressure on DSG budgets.
- 1.3 The budget position has been the focus of several discussions tabled at Schools Forum where proposals have been approved with the aim of reducing the pressures in the High Needs Block. Following Governmental direction, the DSG budget is required to be balanced at the end of each financial year which has been achieved.
- 1.4 However, with an increased demand for specialist places balancing the budget is becoming harder to do. A recruitment process is underway to appoint a Commissioning Manager and Placement Finding Officer who will sit within the EHCP team to provide further scrutiny of spending. Continuing to secure specialist places in Warrington to meet demand rather than use out of borough placements remains the default position for the council.

## **2. CURRENT POSITION – DEMAND FOR EDUCATION, HEALTH AND CARE PLANS**

- 2.1 SEND has continued to be a priority for the Local Authority and in response to the Local Area OFSTED inspection in January 2023 there has been even more emphasis on ensuring capacity in the system through the Sufficiency Strategy (Appendix 2) to manage the demand for more specialist places and meet the higher complexity of need for some pupils.

- 2.2 As the number of EHC plans increases, so too does the cost from the High Needs budget to support children and young people. Data indicates there has been a significant rise in the number of EHCPs; from 1,610 in 2018 to 2,094 in 2024. This growth is being experienced nationally and is the subject of debate in education forums.
- 2.3 The data comparison over the last seven years shows the numbers of children and young people aged 5 to 15 years has increased from 1,104 in 2018 to 1,392 in 2024 and is rising on a steeper trajectory in Warrington than other parts of the Northwest. This could in part be due to the fact that Warrington historically has lower numbers of EHCPs than other areas.

Table 1: Maintained EHC Plans for Warrington children 0-25 years as of May 2024

	2018	2019	2020	2021	2022	2023	2024
Under age 5	50	18	30	46	61	59	108
Aged 5 to 10	493	486	479	468	482	507	659
Aged 11 to 15	611	598	630	619	630	687	733
Aged 16 to 19	393	348	390	447	463	493	490
Aged 20 to 25	63	46	93	80	95	132	104
<b>TOTAL</b>	<b>1610</b>	<b>1,566</b>	<b>1622</b>	<b>1,660</b>	<b>1,742</b>	<b>1,878</b>	<b>2,094</b>

- 2.4 There has been considerable work with schools through the Sufficiency Strategy to ensure where there is a need for a specialist place, it is secured in Warrington rather than out of borough. As a result, Special school places and Designated Provision places in Warrington have increased by 80 and 27 respectively since 2018. This has helped to reduce the number of children placed in Independent Special Schools by 36 as illustrated in the table below.
- 2.5 The table also illustrates the higher number of children with an EHC plan in mainstream schools. Although Warrington statistically falls below national, (NA 52.7%) for children being accommodated in mainstream with an EHCP, the increase of places from 2023 is significant.

Pre16	2018	2019	2020	2021	2022	2023	2024
PVI Early Years Settings	5	0	0	2	4	1	2
Mainstream Settings	607	570	469	557	540	570	763
Designated Provision	173	147	270	182	188	197	200
Maintained Special Schools	346	350	352	373	392	409	426
Non-maintained Special School	13	26	28	25	13	26	18
Independent special schools	72	62	95	106	114	119	83
AP/PRU	1	2	6	6	9	5	8
<b>Total</b>	<b>1154</b>	<b>1155</b>	<b>1139</b>	<b>1,133</b>	<b>1184</b>	<b>1253</b>	<b>1500</b>
<b>Proportion of children in mainstream</b>	<b>52.59%</b>	<b>49.35%</b>	<b>41.18%</b>	<b>49.16%</b>	<b>48.14%</b>	<b>45.49%</b>	<b>50.87%</b>

### 3. FINANCIAL IMPLICATIONS 2024/25

- 3.1 Financial data indicates that overall spend for Special Educational Needs (as extracted from the High Needs Block and DSG)<sup>1</sup> increased from **£22,738,897** in 2022/23 to **£27,225,579** in 2023/2024. As explained above, the most significant individual spend was on Special School budgets which was **£7,240,124** in 2022/23 and **£7,834,788** in 2023/24, to **£8,391,000** in 2024/25.
- 3.2 Spend has increased for independent and non-maintained settings where pupils' with EHC Plans needs cannot be met locally. The total cost of this was **£4,007,747** in 2022/23 and **£5,146,049** in 2023/24. It is expected that spend on placements will continue to rise despite efforts to reduce the numbers accessing these types of placements because of increased charges mainly from the independent sector.
- 3.3 Other areas of increased spend in 2023/24 has been in budget lines to support pupils who are Educated Other than At School (EOTAS) or through home tuition because they are not able to attend school. Costs for EOTAS and medical tuition were **£408,248.11** in 2022/23 and **£1,267,985** in 2023/24.

### 4. PROPOSALS TO SUPPORT A REDUCTION IN SPEND ACROSS THE HIGH NEEDS BUDGET IN 2024/25

- 4.1 One of the key issues for school leaders is how, with shrinking school budgets, they can meet the needs of pupils who are on SEN Support where they feel they could intervene early before an EHCP.
- 4.2 The Notional Budget is an indicative amount to guide schools in their spending to meet the needs for children in this cohort. In some cases there is a significant mismatch between the notional SEN budget and actual costs of SEN support because the school has a disproportionate number of pupils with SEN in relation to its size, phase and characteristics, or has pupils with needs of a particular kind that are not captured by the formula factors used.
- 4.3 It is proposed that a part of the High Needs budget is dedicated to these schools as a pilot to understand if it has a positive impact on meeting pupil needs earlier and maintaining support in mainstream schools. It is suggested that £300,000 is put aside for schools in this situation in 2024/25. The paper, 'Proposal to enhance the notional SEN budget for children coded as SEN Support' outlines the proposal in more detail.
- 4.4 To reduce the costs for medical and EOTAS cases, a proposal is to invest in a 'Re-

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<sup>1</sup> Due to a change in personnel in the Accountancy team, collating some financial information has been difficult due to the reporting mechanisms previously in place. This figure includes monies provided to schools from the High needs block inc. DP funding, element 3 top ups but may exclude some in year adjustments reported elsewhere.

engagement Centre' for children who are absent from school due to Emotionally Based School Avoidance or additional needs including those with social, emotional and mental health (SEMH) difficulties. Where appropriate, pupils would attend this Centre rather than accessing tuition at home as a transition back into school. This would involve funding a teacher and two teaching assistants per 8 pupils costing £132,888 for the full academic year (£77,518 in the 2024/25 financial year), plus resources.

4.5 Appendix A outlines projects that are already in place or which have been initiated and which have been discussed with Schools Forum previously. These include the ASD Free School, the movement of Woolston Sixth Form to the Peace Centre to release more space in Green Lane and Fox Wood Special Schools and additional Designated Provision places.

4.6 The estimated costs of the proposals are shown in Appendix 1.

**4. RISKS**

4.1 The risks of not investing in the SEND system and not implementing proposals are as follows:

Political	<p>Reputational risk if leaders to not have appropriate plans in place to improve the effectiveness of our arrangements and access to sufficient and suitable provision for children and young people with SEND.</p> <p>There could be increased parental dissatisfaction with the Council if pupil progress is impacted upon and needs not met which could be damaging to our reputation.</p>
Economic	<p>Historical funding models to support children’s needs and insufficient funding in the high needs block of the DSG is placing significant pressures on the school leaders and the council to contain spend within the funding allocated by the government.</p> <p>Schools may feel they can no longer meet the needs of the more complex children who have the highest levels of support to maintain mainstream placements which could result in greater demand for our specialist provisions.</p> <p>Greater demand on transport costs if local schools cannot meet need and pupils are moved to our specialist provisions which could be further from home.</p>
Social	<p>Increased social media traffic / complaints / legal challenge from parents/carers about the Warrington offer for pupils with Special Educational Needs.</p>

Legal	Non-compliance to the statutory guidance and the consult on changes to provision will undermine the review and may result in legal challenge.
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## 5. RECOMMENDATIONS

### 5.1 Schools Forum is asked to:

- a. Note the increased spend in the High Needs Budget.
- b. Support the proposal for any surplus in the DSG Schools Block funding to be committed to SEND proposals identified.
- c. Have consideration of the impact changes may have on the High Needs Block. There may be a temporary negative impact as funding is reinvested locally. The impact of this should lessen as funding starts to transfer back into the High Needs block as placements in the independent sector are reduced.
- d. Note that the council will work with all stakeholders; SENDIASS, WarrPAC, parents / carers and with WAPH, WASCL, school leaders and governors to share the progress of projects.



## APPENDIX 1: Financial implications

PRIORITY	ITEM	TIMELINE	STATUS	Y1 2024/25 (FY)	Y2 2025/26 (FY)	Y3 2026/27(FY)	PRIORITY	Comments re: implementation
1.	Establish a new 16 place KS3/4 extraordinary provision	Sept-2024	AGREED	£155,036.00	£270,000	£270,000	High	To support transition to the ASD free school and prevent placements being made in the independent sector
2.	Increase Reception places in Foxwood and Green Lane	Sept-2024	PROPOSAL	£198,292.00	£340,000	£340,000	High	To support increased demand for specialist Reception places
3.	Increase Designated Provision places	Sept-2024	AGREED	£3,050,138	£3,407,969	£3,661,221	High	To support demand for specialist places. (ESFA have allocated place funding and Top up funding allocated 2024/25 via Funding pack.)
4.	Funding to support pupils on SEND support	Sept-2024	PROPOSAL	£300,000.00	PILOT	PILOT	Medium	To support pupils on SEND support who are on the way to an EHCP
5.	Primary SEMH Hub	Sept-2023	AGREED	£118,000.00			Medium	Continued funding to support children in Primary schools who have SEMH needs. Via Oakwood in One Community Trust.
6.	Establish a 56 place ASD Free School	Sept-2025	AGREED	0	£560,000	£1,232,000	High	Implemented through DfE bid to open Free School process
7.	Re-engagement centre	Sept-2024	PROPOSAL	£80,000	£55,000		High	Staffing Costs per annum based on 1 Teacher & 2 TA's.
8.	Relocate further education offer from Woolston Learning Village	Sept-2025	PROPOSAL		£850,000	£850,000	High	Initial relocation costs to be met through Capital investment
9.	Increase commissioned specialist post 16 education placements from 40 to 60	Sept-2025	PROPOSAL		£699,480	£699,480	Medium	Allows for forecasted growth in population
<b>Total</b>				£3,901,466	£6,182,449	£7,052,701		

## APPENDIX 2

# Warrington's SEND Sufficiency Strategy 2023/24

## 1. Introduction

Warrington's SEND and Alternative Provision Partnership Board is committed to improving the quality and availability of provision in Warrington's nurseries, schools and colleges for children and young people with special educational needs and/or disabilities (SEND) so that they receive the help they need to achieve their potential. Being able to attend a local school where the teachers and support staff can meet their education needs is key to achieving this ambition so that young people have the skills they need to thrive in their adult lives.

Our assessment of what further change is needed so that more children and young people with SEND can be educated in Warrington is based on:

- What we understand about children and young people's needs as identified in our Joint Strategic Needs Assessment.
- Our evaluation of how well schools in Warrington meet the needs of SEND pupils in their schools identified in our SEND Peer to Peer Review process.
- Other softer intelligence gathered from our partners including Warrington Parents and Carers Forum and the SEND Information Advice and Support Service.

In response to these findings, we have outlined in this document our SEND Provision Plan setting out our intention to create more local places for children and young people with SEND living in Warrington.

In doing this we aim for:

- Children and young people to stay connected to their local communities

- Children and young people to spend less time travelling to and from school
- More local school places to meet the current and future needs of children and young people with SEND
- Make the best use of the resources available, targeting specialist resources them to those with the highest level of need.

## 2. Special Educational Needs and Disabilities (SEND)

SEND can affect a child or young persons' ability to learn and can affect a child or young persons:

- Behaviour
- Ability to communicate and interact with the world around them
- Reading and writing
- Ability to understand things
- Concentration levels
- Physical ability.

A child or young person may require an Education, Health and Care (EHC) Plan if they need special educational provision to be made for him or her beyond what is ordinarily available for other children and young people of the same age.

In line with Section 33 of the Children and Families Act, children and young people with an EHC Plan must be educated in a mainstream school, unless (a) the parents or the young person do not wish it or (b) it would be incompatible with the efficient education of others and there are no reasonable steps that could be taken to avoid this. The degree or complexity of their needs or disabilities, and the suitability of mainstream, is not a reason in law for refusal of mainstream school.

## 3. Types of need

The SEND Code of Practice<sup>2</sup> identifies four broad areas of need which can impact a child or young person with SEND:

1. Communication and interaction – Speech, Language and Communication Needs (SLCN) and Autistic Spectrum Disorder (ASD)

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<sup>2</sup> Ibid

2. Cognition and learning – Moderate Learning Difficulties (MLD), Severe Learning Difficulties (SLD), Profound Multiple Learning Difficulties (PMLD) and Specific Learning Difficulties (SpLD).
3. Social, emotional and mental health (SEMH) needs.
4. Sensory and/or physical needs – Vision Impairment (VI), Hearing Impairment (HI), Multi-Sensory Impairment (MSI) and Physical Impairment Disability (PID).

#### 4. The graduated response

Warrington Borough Council in collaboration with school leaders and health partners have put in place a graduated response, setting out the minimum expectations for schools about what support a child or young person with SEND attending a school in Warrington should expect to receive.

The graduated response means that we expect all schools in Warrington, regardless of their status, to make reasonable adjustments so that most children and young people with SEND can attend their local mainstream school and enjoy the same opportunities as their peers.

Some children and young people have more complex needs which require a multi-agency response from education, health and care services to meet their needs. In these cases, the Council will conduct a multi-agency assessment of the child/young person's needs and through this process determine what additional support they need. If following this assessment, it is found that a child or young person will require special educational provision additional to or different from that made generally for other children or young people of the same age, an EHC Plan will be put in place.

As part of this process, the Council will set out in the child's EHC Plan the provision which is required to meet their needs. On issuing the draft EHC Plan the Council will ask the parent of the child and/or the young person themselves which school they propose to be named in the final EHC Plan. The Council must consult with that institution about whether it should be named in the final EHC Plan, unless it is for an independent school not approved by the Secretary of State.

When considering which school will be named the Council will consider if:

- The setting is unsuitable for the child's age, ability, aptitude or special educational needs.
- The attendance of the child at that setting would be incompatible with the efficient education for others at the school and the Council are unable to prevent this incompatibility.

- The attendance of the child at the school would be incompatible with the efficient use of resources.

When looking at whether the placement is incompatible with the efficient use of resources, the Council will assess the total cost of the parent's proposed placement and whether it would constitute reasonable public expenditure in comparison to the Council's proposed school. The final decision on the name of the school is the Council's.

## **5. Warrington's local offer**

### **A. Children in the early years**

There are a total of 277 registered childcare settings in Warrington. This includes 145 childminders, 53 full day care settings, 29 sessional providers and 39 out of school settings. In addition, there are 20 maintained nursery classes and 9 academy nurseries. The overall number of places has reduced because of a combination of factors including a lower live birth rate, more people working from home and the cost-of-living crisis.

Children and their families benefit from a good mix of early years providers and most of this provision is judged by OFSTED to be good or outstanding - 100% of day nurseries, preschools and out of school clubs who are judged good or outstanding along with 96% of childminders.

- **Sandy Lane Forest School Nursery**

Sandy Lane Nursery and Forest School is an inclusive mainstream nursery with alternative provision for children with complex needs between the ages of 2 and 4 years of age. The nursery functions as the assessment nursery for Warrington Borough Council and support is provided for pre-school children who have or are undergoing assessment by the Child Development Centres (CDC) multi-disciplinary team.

There are 24 specialist nursery placements at Sandy Lane Nursery, but demand currently outstrips supply of placements and so there is a reliance of the PVI sector and state-funded nurseries to support more children with additional needs.

### **B. Statutory school age children**

- **Mainstream schools**

There are currently 69 mainstream primary schools and 14 secondary provisions in Warrington. These are a mix of academies, free schools, voluntary and maintained provisions. Most of these schools are judged by OFSTED to be good or outstanding.

Mainstream schools in Warrington are legally required to:

- Put in place additional support for children and young people with lower levels of SEND, referred to as SEN Support, from their school budgets.
- Fund the first £6,000 of education provision for children and young people with EHC Plans who attend their schools.

Funding is delegated from the High Needs Block to enable schools to put in place this additional support through the notional budget.

- **Designated provisions**

There are a range of designated provisions attached to some of Warrington’s mainstream schools for pupils with ASD, cognition and learning difficulties, SEMH and SLCN. Children who attend a Development Centre may have a range of needs and may take up a placement on an assessment basis.

Designated provisions are not a statutory requirement, but they enable children and young people with SEND to attend a mainstream school and at the same time receive specialist support to meet their needs. Children and young people attending designated provisions will usually have an EHC Plan unless it has been agreed with the Council and school for the child to attend on an assessment basis.

As of 2023, there were 11 schools offering 203 places specialist places in mainstream schools, as follows:

School	Key Stage	Type of provision	Places	OFSTED Judgment	Date of inspection
Bewsey Lodge Primary	Key Stage 1	Cognition & Learning	8	Good	6-Oct-2021
Meadowside Primary	Key Stage 1	Development Centre	8	Good	3-Nov-2015
Dallam Community Primary	Key Stage 1	Autistic Spectrum Disorder	8	Good	13-Dec-2017
Gorse Covert Community Primary	Key Stage 1	Autistic Spectrum Disorder	8	Good	31-Aug-2019
Oakwood Avenue Community Primary	Key Stage 1	Social, Emotional and Mental Health	8	Good	30-Mar-2019
Woolston Community Primary	Key Stage 1	Autistic Spectrum Disorder	8	Good	21-Apr-2015

School	Key Stage	Type of provision	Places	OFSTED Judgment	Date of inspection
Bewsey Lodge Primary	Key Stage 2	Cognition and Learning	10	Good	6-Oct-2021
Meadowside Primary	Key Stage 2	Cognition and Learning	10	Good	3-Nov-2015
Dallam Community Primary	Key Stage 2	Autistic Spectrum Disorder	16	Good	13-Dec-2017
Gorse Covert Community Primary	Key Stage 2	Autistic Spectrum Disorder	8	Good	31-Aug-2019
Oakwood Avenue Community Primary	Key Stage 2	Social, Emotional and Mental Health	10	Good	30-Mar-2019
Oakwood Avenue Community Primary	Key Stage 2	Cognition and Learning	10	Good	30-Mar-2019
Woolston Community Primary	Key Stage 2	Autistic Spectrum Disorder	8	Good	21-Apr-2015
Bridgewater High School	Key Stage 3/4	Autistic Spectrum Disorder	25	Good	12-Oct-2022
St Gregory's Catholic High School	Key Stage 3/4	Autistic Spectrum Disorder	16	Good	27-Nov-2019
Penketh High School	Key Stage 3/4	Cognition and Learning	16	Good	26-Feb-2020
Sir Thomas Boteler CE High School	Key Stage 3/4	Cognition and Learning	14	Good	6-Oct-2021
Padgate Academy	Key Stage 3/4	Cognition and Learning	12	Good	24-May-2023

- **Special schools**

There are also six special schools in Warrington.

The maintained schools are based in the north of Warrington in Woolston. Green Lane and Fox Wood Schools are located on the same site at Woolston Learning Village on Holes Lane and Woolston Brook is located across the road on Green Lane.

Chaigeley School and Bright Futures are based in the south of Warrington in Thelwall and Lymm. Birchwood Services is in the north of the town in Birchwood.

These schools educate the most complex children and young people with SEND as follows:

School	Age range	Type of school	Type of provision	Pupil Admission Numbers	On roll	OFSTED Judgement	Date
Woolston Brook School	8 to 16 years	Maintained special school	Social, Emotional and Mental Health needs	72	72	Good	9-Jan-2019
Green Lane School	4 to 19 years	Maintained special school	Autistic Spectrum Disorder with Moderate learning Difficulties or Severe Learning Difficulties	220	221	Outstanding	19-Nov-2019
Fox Wood School	4 to 19 years	Maintained special school	Autistic Spectrum Disorder with Severe Learning Difficulties or Profound and Multiple Learning Difficulties	78	124	Good	19-Oct-2021
Chaigeley School	8 to 16 years	Non-maintained special school	Social, Emotional and Mental Health needs	75	41	Good	16-Jul-2018
Bright Futures	4 to 25 years	Independent special school	Autistic Spectrum Disorder	75	62	Good	23-Nov-2021
Birchwood Services	8 to 19 years	Independent special school	Autistic Spectrum Disorder	25	13	Good	24-Jun-2021



## C. Post 16 provision

- **Sixth Form Colleges**

In Warrington there are five mainstream secondary schools offering sixth form colleges for young people post 16 years:

School	Age range	Type of school	Type of provision	Pupil Admission Numbers	On roll	OFSTED Judgement	Date
UTC Warrington	16-19 years	University Technical College	Secondary, with a sixth form college	620	249	Good	15-May-2019
Lymm High School	11-18 years	Academy	Secondary, with a sixth form college	1,990	1,916	Good	07-Dec-2022
Kings Leadership Academy	11-18 years	Free school	Secondary, with a sixth form college	840	750	Outstanding	11-Jul-2019
Great Sankey High School	11-18 years	Academy	Secondary, with a sixth form college	2,175	2,124	Good	29-Mar-2023
Birchwood Community High School	11-18 years	Academy	Secondary, with a sixth form college	1,050	992	Good	11-Oct-2018

- **General Further Education Colleges**

There are also two mainstream General Further Education Colleges in Warrington:

School	Age range	Type of school	Type of provision	Pupil Admission Numbers	On roll	OFSTED Judgement	Date
Warrington and Vale Royal College	16-99 years	Further education	General Further Education College		Not available	Good	11-Oct-2019
Priestley College	16-19 years	Academy	General Further Education College	2,250	Not available	Good	16-May-2019

- **Specialist post 16 institutions**

#### Woolston Sixth Form College

Leaders across Fox Wood and Green Lane have worked to develop a specialist sixth form college offer and as a result there are a wide range of vocational options for learners 16-19 years, including the study of horticulture, catering, administration and retail for young people post 16 with EHC Plans with Autistic Spectrum Disorder with Severe Learning Difficulties or Profound and Multiple Learning Difficulties. Whilst the provision is delivered as one sixth form, they have two URNs which makes them two distinct schools for financial and governance purposes.

The Council has commissioned 40 places at the sixth form year on year but has plans to increase this to 60 by September 2025.

#### Morthyng Vocational College

Morthyng Vocational College offers an individualised programme to enable learners to achieve English and maths qualifications and participate in work experience opportunities.

For September 2023, the Council commissioned 17 places for young people, up from 14 in 2022.

#### Myerscough College

Myerscough College is a land based further education college based in West Yorkshire. The College has worked in partnership with the Council and Walton Lea Partnership to establish courses in Foundation Learning, Animal Studies, Horticulture and Landscape Studies in the heart of Walton Hall Park.

### **D. Post 19 provision**

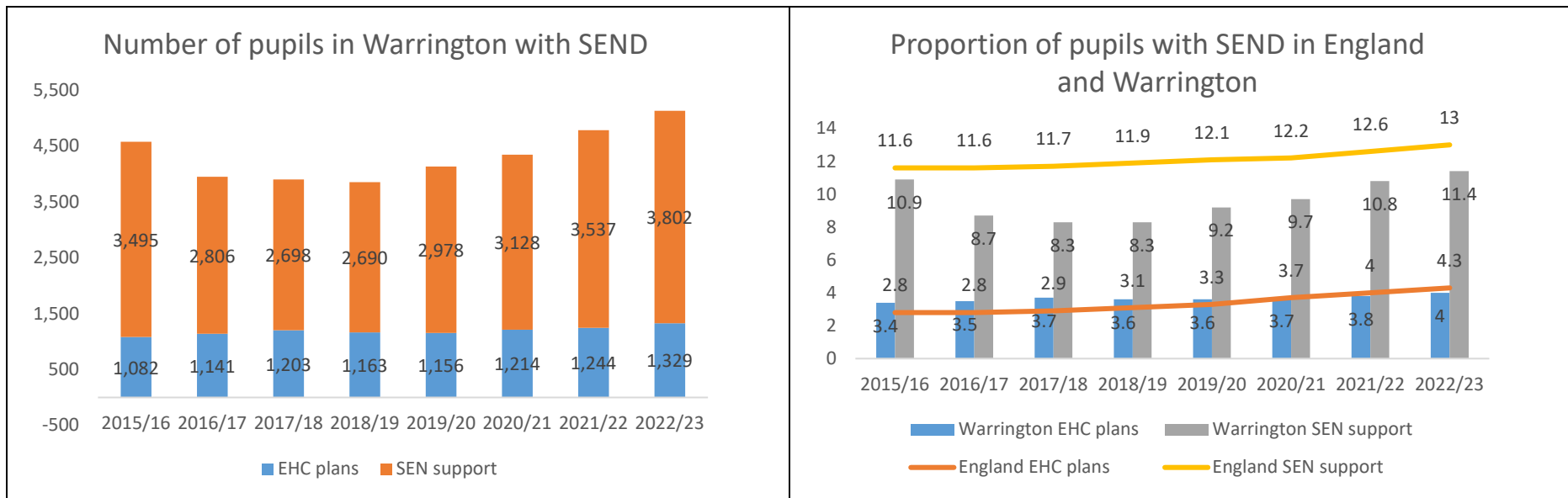
#### Willow Green

The Council commissions 10 pre and supported internships from Willow Green for learners with ASD and associated learning difficulties to enable young people to progress into paid employment.

Supported internships are also available from Warrington and Vale Royal College.

## 6. Need and demand in Warrington

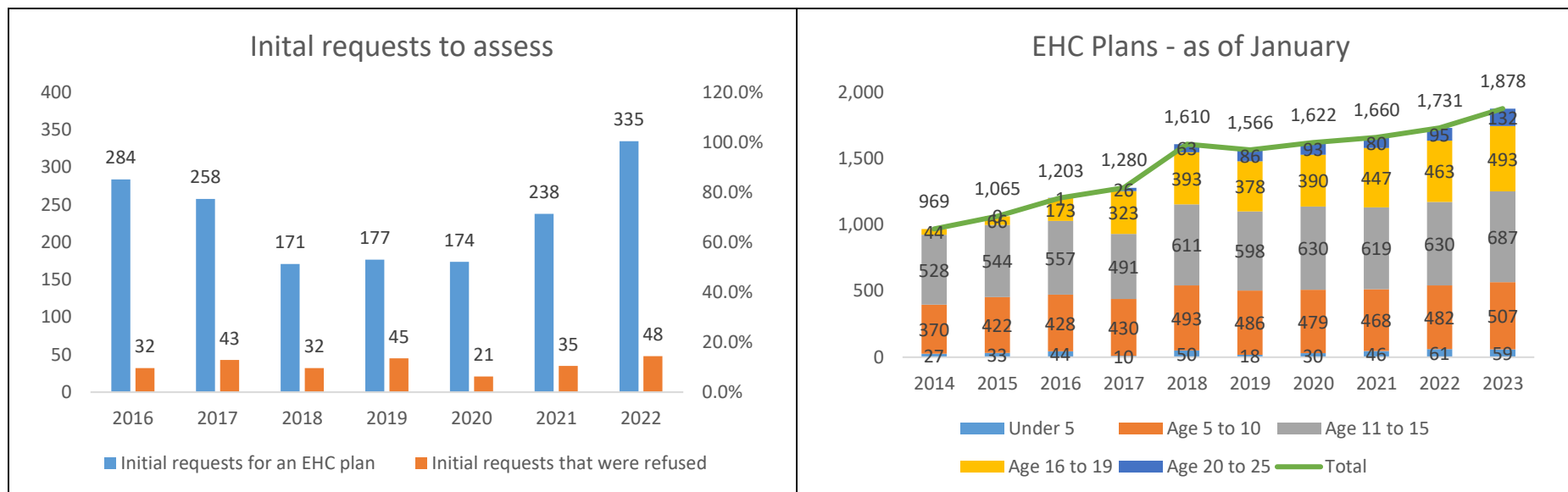
At the time of the census in January 2023, there were 5,131 children and young people with SEND attending Warrington schools and 11.4% of these required SEN support and 4% had an EHC Plan to support their needs. The biggest area of growth in Warrington has been driven by a rise in the number of pupils requiring an EHC Plan from 985 in 2014 to 1,329 in 2023 - this is in line with the national trend following a period of year-on-year increases in EHC Plan numbers in schools in England. Proportionally, Warrington has less pupils identified with SEND compared to the England average – 13% of pupils require SEN Support and 4.3% have an EHC Plan nationally.



Despite the statistics, Warrington’s school system is under extreme pressure; finding it difficult to respond to the rise in demand and complexity of presenting need. This can be attributed to the net growth in the pupil population despite live births decreasing, because of migration into the town following on from housing developments and an increase in immigration.

Requests for EHC needs assessments have increased for the third consecutive year following a period of relative stability between 2018 and 2020 – whilst requests to assess increased 23% nationally between 2021 and 2022, in Warrington the increase was 41% over the same time

frame. Some of this increase is because of the extension of support to children under 5 years old and to young people over 16 years because of the reforms introduced in 2014 under the Children and Families Act. However, children of compulsory school age have also increased from 898 to 1,194.



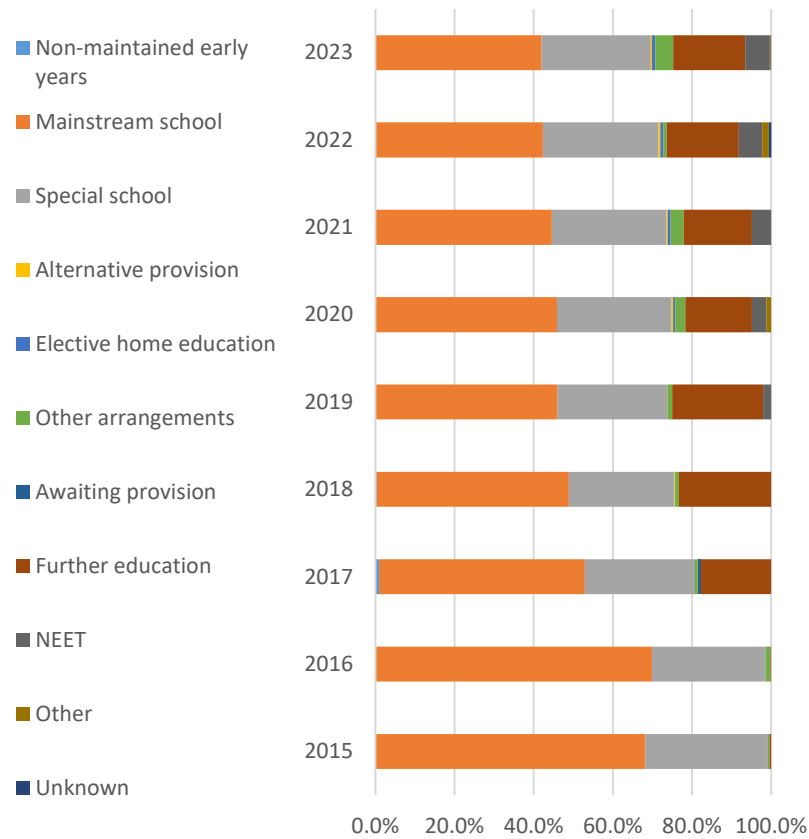
In terms of provision, the number of children and young people with EHC Plans attending a mainstream school since 2015 has increased just 8% from 727 to 786 in 2023. This equates to 41.9% of all placements (which is largely in line with the national average – 40.9%), but overall is down from an all-time high in 2016.

Since 2014 more statutory school age children and young people with EHC Plans have been placed in the special school sector:

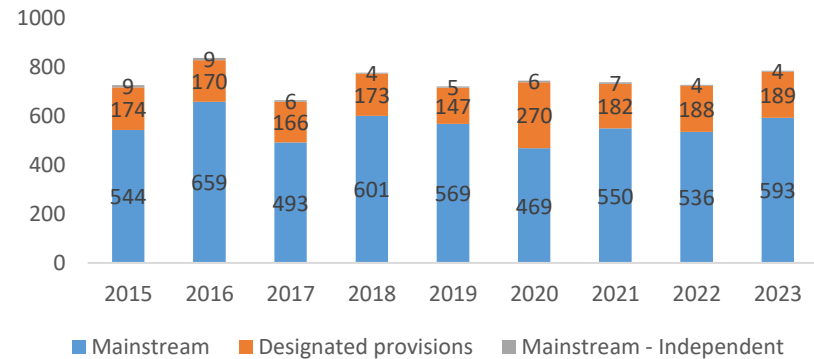
- Those placed in state funded special schools has increased - 57% from 264 to 415; and
- Those placed in the independent and non-maintained sector has also increased 80% - from 66 in 2015 to 103 in 2023.

This contrasts with the national picture where EHC Plan numbers are reported as rising higher in mainstream schools than in special schools - nationally, the number of pupils with EHC Plans in mainstream schools has grown by 68%, whilst the number in special schools grew by 54% between 2015 and 2023.

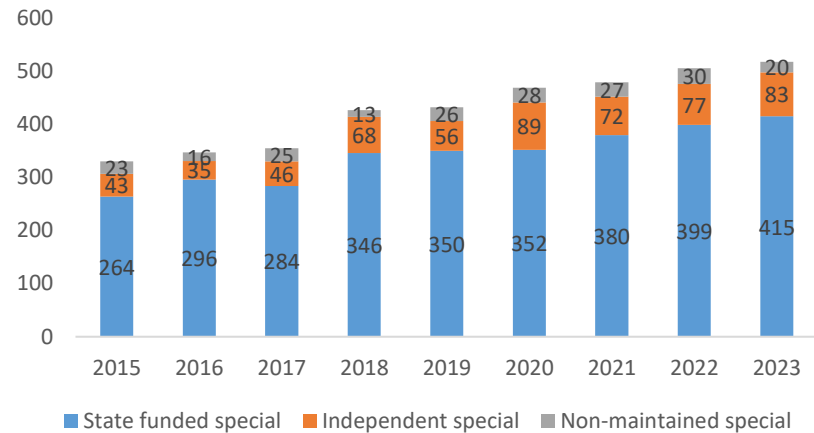
### Placements attended by children and young people with EHC Plans



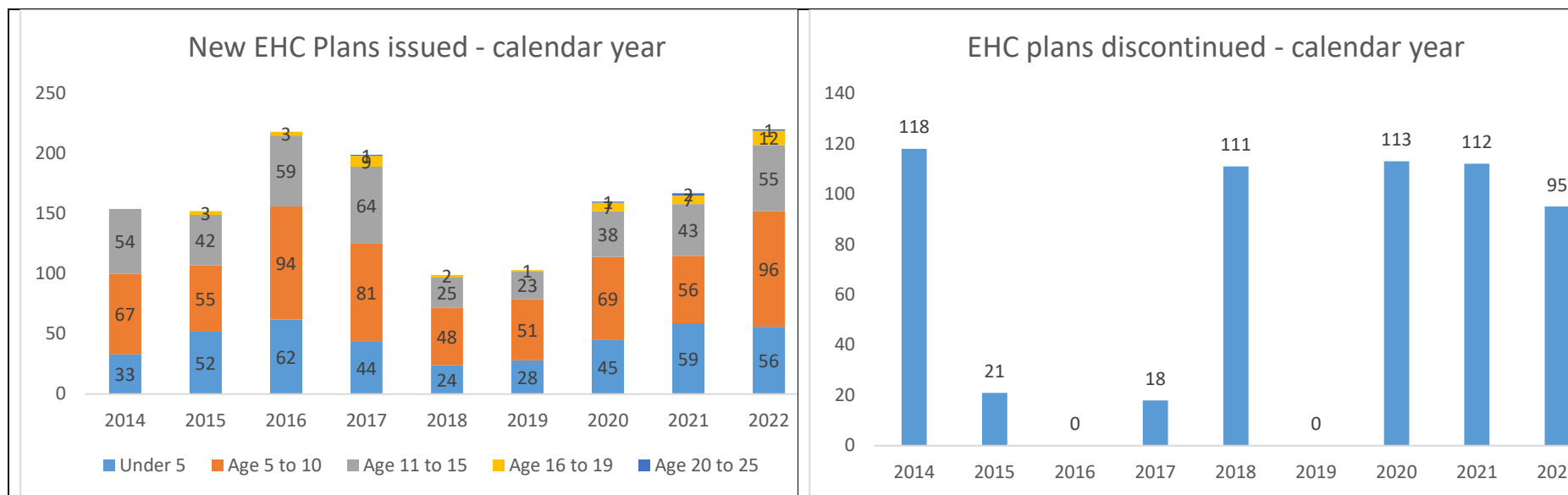
### Type of mainstream provision



### Type of special school placements



In Warrington, the number of EHC Plans which are ceased is not keeping pace with the number of new EHC Plans being issued in each calendar year – for example in 2022, 216 EHC Plans were issued compared 98 being ceased. The majority of the EHC Plans ceased were for young people over 19 years.



Therefore, Warrington can expect a net growth of EHC Plans in the future and continue high demand for special school places if these trends continue to persist.

## 7. Future need and demand in Warrington

### A. Children in the early years

The number of children 5 years and under who require special educational provision to be made for them has increased from 27 in 2014 to 59 in 2023 - the most prevalent primary needs for these children are ASD (27.5%) and SLC needs (27.5%). Only four had a Physical Disability and two had PMLD.

Since the census in January 2023, there has been a significant rise in the number of children under 5 years with an EHC Plan to 156 as of the 1 September 2023 and there is a further 74 children in the early years who have been identified as requiring an EHC Plan to support them when they start school in September 2024.

Forecasting models for this age range are not as reliable as those completed for statutory school age children. For example, based on the average annual change rate for EHC Plans this cohort could rise by a further 45% over the next ten years from 98 to 142. However, this 10-year estimate has already been surpassed in September 2023.

Therefore, when forecasting how many places are required in the nursery sector it is more accurate to use known quantities. As of the 1 September 2023, 18% (26) of children aged three and four years and 31% (16) of children two and three years require a specialist nursery placement.

**Table 1: Early years children with SEND as of 1 September 2023**

	<b>NCY -1</b>	<b>NCY -2</b>
ASD with PMLD	7	6
ASD with SLD	19	10
High level of support	24	8
Mainstream	91	28
<b>Total</b>	<b>141</b>	<b>52</b>

*Source: Warrington Borough Council, Early Years Department, 2023*

Based on current demand in the system we do not have sufficient places to meet the needs of the children under 5 years we are identifying in Warrington and need to increase the number of full-time specialist nursery places at Sandy Lane Nursery and Forest School in the short term to 24 places and in the longer term to 32 places.

## **B. Statutory school age children**

Places for statutory school age children have been calculated using the Department for Education’s guidance for forecasting demand for SEND provision. The figures are based on the following model:

1. The forecast of overall pupil numbers (by year group) based on live birth rates, housing growth and immigration into Warrington.
2. The number of pupils who are likely to require an EHC Plan based on future pupil numbers, the prevalence of EHC Plans and the step change rates.
3. The likely destination of pupils with EHC Plans based on prevalence of EHC Plans in these settings and the step change rates.

In some cases, it has been necessary to apply a floor protection so that total EHCPs in a given cohort will never reduce below the number it possessed the previous academic year. These figures are marked with a \*.

- Pupils with EHC Plans**

The proportion of pupils with EHC Plans is expected to increase across all year groups, except for Year 9 pupils in 2028/29 and 2029/30 and Year 10 pupils in 2029/30 which will decrease from 6.2% to 5.3% and 6.4% to 5.3%.

**Table 2: Proportion of Pupils with EHC Plan – actual and seven-year forecasts**

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11
<b>2019/20</b>	1.5%	3.3%	3.0%	3.8%	3.4%	3.7%	4.5%	5.1%	4.6%	5.6%	5.6%	4.4%
<b>2020/21</b>	1.9%	1.9%	3.7%	3.2%	4.3%	3.5%	4.1%	4.5%	5.3%	5.0%	5.8%	6.0%
<b>2021/22</b>	2.2%	2.1%	2.2%	3.8%	3.6%	4.8%	4.3%	4.1%	4.8%	5.7%	5.2%	6.1%
<b>2022/23</b>	2.7%	3.1%	2.6%	2.9%	4.4%	4.2%	5.4%	4.5%	4.4%	5.0%	6.1%	5.5%
<b>2023/24</b>	3.6%	3.2%	3.5%	3.1%	3.3%	4.9%	4.8%	5.5%	4.8%	4.8%	5.2%	6.4%
<b>2024/25</b>	3.6%*	4.1%	3.6%	4.0%	3.5%	3.8%	5.5%	4.9%	5.7%	5.2%	5.0%	5.5%
<b>2025/26</b>	3.6%*	4.1%*	4.5%	4.1%	4.4%	4.0%	4.4%	5.6%	5.1%	6.1%	5.4%	5.3%
<b>2026/27</b>	3.6%*	4.1%*	4.5%*	5.0%	4.5%	4.9%	4.6%	4.5%	5.8%	5.5%	6.3%	5.7%
<b>2027/28</b>	3.6%*	4.1%*	4.5%*	5.0%*	5.4%	5.0%	5.5%	4.7%	4.7%	6.2%	5.7%	6.6%
<b>2028/29</b>	3.6%*	4.1%*	4.5%*	5.0%*	5.4%*	5.9%	5.6%	5.6%	4.9%	5.1%	6.4%	6.0%
<b>2029/30</b>	3.6%*	4.1%*	4.5%*	5.0%*	5.4%*	5.9%*	6.5%	5.7%	5.8%	5.3%	5.3%	6.7%
Step Change Rate:		0.45%	0.45%	0.45%	0.45%	0.45%	0.6%	0.1%	0.3%	0.4%	0.2%	0.3%

Source: Warrington Borough Council, SEND Department, 2023

Based on these prevalence rates, the number of pupils with EHC Plans will increase from 1,332 to 1,705 by 2029/30:



**Table 3: Number of Pupils with EHC Plan – actual and seven-year forecasts**

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	NOR
<b>2019/20</b>	39	81	76	98	88	97	114	133	114	134	135	105	1,214
<b>2020/21</b>	45	49	89	80	112	93	107	113	137	124	138	145	1,232
<b>2021/22</b>	51	52	58	96	94	131	116	110	123	149	132	145	1,257
<b>2022/23</b>	64	74	66	77	113	113	150	122	120	131	164	138	1,332
<b>2023/24</b>	84	77	88	80	92	128	133	151	130	132	142	173	1,408
<b>2024/25</b>	82	97	91	102	94	107	148	141	159	142	143	151	1,457
<b>2025/26</b>	78	97	111	105	117	109	127	157	149	171	153	152	1,526
<b>2026/27</b>	77	93	108	125	119	131	128	134	165	161	183	162	1,584
<b>2027/28</b>	72	92	103	122	140	134	151	137	142	177	173	193	1,635
<b>2028/29</b>	73	84	102	116	137	154	153	163	145	154	189	182	1,653
<b>2029/30</b>	75	84	97	118	133	155	178	169	172	159	167	200	1,705

Source: Warrington Borough Council, SEND Department, 2023

- **Designated provisions**

Demand for Designated Provision places is expected to increase significantly based on the growth of pupils placed in these settings over the past four years and forecasts show that there will be 300 pupils in Designated Provision places by 2029/30:

**Table 4: Number of Pupils in Designated Provision Places – actual and seven-year forecasts**

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	NOR	Deficit
<b>2019/20</b>	6	11	20	15	16	16	17	18	18	18	12	19	186	14
<b>2020/21</b>	15	8	12	17	15	18	15	22	21	19	14	11	187	13
<b>2021/22</b>	10	16	11	9	21	17	17	16	23	20	20	13	193	7
<b>2022/23</b>	9	16	17	15	9	27	19	16	19	23	19	23	212	-11
<b>2023/24</b>	18	16	18	13	15	21	21	23	19	20	21	21	225	0
<b>2024/25</b>	17	20	19	17	16	18	25	21	24	21	21	23	244	19

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	NOR	Deficit
<b>2025/26</b>	16	20	23	18	20	19	22	27	25	29	26	26	271	46
<b>2026/27</b>	16	20	23	21	20	22	22	23	28	27	31	28	281	56
<b>2027/28</b>	15	19	22	21	24	23	26	23	24	30	29	33	289	64
<b>2028/29</b>	15	18	21	20	23	26	26	28	25	26	32	31	291	66
<b>2029/30</b>	16	18	20	20	23	26	30	29	29	27	28	34	300	75

Source: Warrington Borough Council, SEND Department, 2023

The actual number of places commissioned by the Council through the ESFA is 201. It is planned to increase Gorse Covert ASD Designated Provision from 8 to 16 places for Key Stage 1 and 2 pupils and open a new 16 place SEMH provision at Cardinal Newman High School. **This would result in a deficit of 75 places. To address need Warrington would need to steadily increase these number of Designated Provision Places from 2024/25 onwards.**

- **Special schools**

The forecasts are based on pupils attending maintained and non-maintained special school places in line with the Department for Education's guidance. Over the next seven years it is expected that the number of pupils in these types of provision will increase from 398 to 599.

**Table 5: Number of Pupils in Special School Places – actual and seven-year forecasts**

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	NOR	Deficit
<b>2019/20</b>	15	14	24	27	28	22	23	41	48	38	47	40	367	78
<b>2020/21</b>	15	17	18	29	27	31	26	38	44	53	44	51	393	52
<b>2021/22</b>	22	15	15	23	28	29	35	45	36	46	48	45	387	58
<b>2022/23</b>	22	25	19	15	25	29	32	55	43	39	45	49	398	47
<b>2023/24</b>	31	29	32	22	26	36	37	53	45	46	50	61	468	-23
<b>2024/25</b>	30	36	34	29	26	30	42	49	56	50	50	53	484	-39
<b>2025/26</b>	29	36	41	31	35	33	38	55	52	60	54	53	517	-16

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	NOR	Deficit
<b>2026/27</b>	29	35	40	37	36	39	38	51	63	61	70	62	559	-58
<b>2027/28</b>	27	34	38	37	42	40	45	52	54	67	66	73	575	-74
<b>2028/29</b>	27	31	38	35	41	46	46	62	55	59	72	69	581	-80
<b>2029/30</b>	28	31	36	35	40	46	53	64	65	60	63	76	599	-98

Source: Warrington Borough Council, SEND Department, 2023

Across the maintained and non-maintained sector there are currently 445 places available across Woolston Brook, Fox Wood, Green Lane and Chaigeley which is insufficient even with the additional 56 places which the ASD Free School will establish in September 2025.

The key issues to tackle across this sector are:

- Most places at Chaigeley School are not occupied by Warrington children and young people with EHC Plans because of the high take-up from other local authorities and the site, whilst registered for 75 pupils, can only accommodate 45 pupils due to the configuration of the building.
- Fox Wood School is currently oversubscribed by 46 pupils and demand for this setting is forecast to increase from 8 reception pupils each year to 16 from 2024/25.
- Woolston Brook School has poor retention rates and a high turnover of pupils into the independent sector because of not being able to compete with the therapeutic offer available in these types of schools.

There is also a high reliance on the independent sector to meet the gaps in local special school places and to address this Warrington needs to increase places for pupils with ASD and SEMH needs by 100 in the next seven years to tackle the numbers forecast to be educated in this sector.

**Table 6: Number of Pupils in Independent School Places – actual and seven-year forecasts**

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	NOR
<b>2019/20</b>	0	0	1	2	3	0	7	6	6	10	10	19	64
<b>2020/21</b>	0	0	0	3	2	3	2	7	8	5	12	10	52
<b>2021/22</b>	0	1	2	0	6	4	7	3	11	10	14	11	69
<b>2022/23</b>	2	0	3	1	2	8	9	12	11	16	8	1	73
<b>2023/24</b>	2	2	3	3	4	6	8	15	13	13	17	10	96

	YR	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	NOR
<b>2024/25</b>	2	3	4	5	5	6	10	16	18	16	14	18	117
<b>2025/26</b>	2	3	4	3	4	4	6	19	18	21	15	16	116
<b>2026/27</b>	2	3	4	4	4	5	6	12	15	14	13	12	95
<b>2027/28</b>	2	3	4	4	4	5	8	12	13	16	12	14	97
<b>2028/29</b>	2	3	4	3	4	6	8	15	13	14	13	14	99
<b>2029/30</b>	2	3	4	4	4	6	9	15	15	14	12	15	103

Source: Warrington Borough Council, SEND Department, 2023

Therefore, the **overall deficit in special school places is 201 places for pupils with SEMH needs, ASD and for pupils with ASD and SLD and PMLD. To address need Warrington would need to increase local places immediately.**

## E. Further Education

Since the introduction of the changes to the SEND Code of Practice in 2014, the number of EHC Plans maintained by Warrington Borough Council for young people 16-19 years and 19-25 years has increased significantly. As EHC Plan numbers have increased, so too has the number of young people remaining in Further Education across most areas of provision.

The number of young people in further education with an EHC Plan is expected to stabilise over the next seven years following a trend of year-on-year increases – numbers will increase only slightly from 412 to 444 for 16 to 19 years and from 176 to 184 for 19 to 25 years.

**Table 7: Number of Pupils in Independent School Places – actual and seven-year forecasts**

	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20	Total
<b>2019/20</b>	113	115	95	67	53	21	16	3		483
<b>2020/21</b>	145	113	109	80	38	22	12	6	2	527
<b>2021/22</b>	145	142	102	74	50	26	10	7	2	558
<b>2022/23</b>	138	149	125	81	57	38	23	6	8	625
<b>2023/24</b>	164	138	149	76	50	27	15	6	3	627
<b>2024/25</b>	148	164	138	78	49	28	15	6	4	629

	Year 12	Year 13	Year 14	Year 15	Year 16	Year 17	Year 18	Year 19	Year 20	Total
<b>2025/26</b>	149	148	164	77	51	30	16	6	4	645
<b>2026/27</b>	150	140	148	78	52	31	17	6	5	626
<b>2027/28</b>	153	138	150	77	50	29	16	6	4	622
<b>2028/29</b>	150	148	138	77	50	29	16	6	4	619
<b>2029/30</b>	150	143	150	77	51	30	16	6	4	628

This means plans in the system to increase local specialist SEND provision and supported internships through the development of the Peace Centre should be able to accommodate the projected growth in this sector.

## 8. Special Provision Capital Fund

The special provision capital fund has been put in place by the Department for Education to support Councils to invest in improving the quality and range of provision for children and young people with EHC Plans for whom they are responsible for. The funding can be invested in (a) creating new (and additional) places at good or outstanding provision and improving facilities, or developing new facilities, in educational settings for SEND pupils.

In the last few years there has been considerable capital investment into our Warrington Schools to increase both the places for children and young people with SEND, but also to improve resources in our specialist settings.

Our investment projects to date, include:

- Woolston Learning Village has been expanded and additional classrooms and facilities have been established so that Green Lane School has been able to increase their place numbers from 135 to 220 and Fox Wood School from 77 to 124 (up to KS5) since the site opened in 2014. This has prevented more children from being placed in the independent/non-maintained sector.
- The establishment of a new Designated Provision for primary pupils with ASD at Gorse Covert School by converting vacant mainstream classes.
- The establishment of an outdoor space at Woolston Community Primary School Designated Provision.

Our future projects earmarked for investment are set out in section 9.

## 9. Our SEND Provision Plan

Following on from the Council's Review of education provision for children and young people with SEND in 2021, the following planned changes are in development across Warrington's high needs estate:

- 1. ASD Free School** - Warrington made a successful application for a 56 place ASD Free School for pupils in Key Stage 2 to 4. The School was due to open in September 2021 but has been delayed significantly due to identifying a suitable location for the school to be built on. However, the Council plans to open an Exceptional Provision in September 2024 which will provide at least 16 places until the new school has been built and opened in September 2025.
- 2. Peace Centre** - To enable Woolston Sixth Form College for key stage 5 pupils at Green Lane and Fox Wood School to grow in the future, the Council is investing in the development of a new facility at the Peace Centre for young people with EHC Plans. The new provision will offer 60 places for young people 16-19 years and 20 places for young people 19 years plus.
- 3. SEMH Designated Provision** - The Council has commissioned a new 16 place specialist Designated Provision for pupils with SEMH needs. The provision will be based on the site at Cardinal Newman High School and will require a new build on site. It is hoped that the building will be open to new pupils by January 2025

To improve our sufficiency of school places for children and young people with SEND, it is recommended that:

- 4. The right to a mainstream education is the default position** - all children and young people with EHC Plans will be educated in their local mainstream school, unless requested by the parent or young person in line with the Children and Families Act 2014. The final decision on the most suitable placement for the child will be made by the Council.
- 5. SEND support will be provided to all mainstream schools** - as part of the Committed to Inclusion programme all schools will have access to training to deliver the provision outlined in children's individual EHC Plans and all schools will understand their legal duty to facilitate the provision of a mainstream education for all children and young people, regardless of their needs.

6. **Specialist nursery places increase** – it is proposed that the number of nursery school places for children with the most complex needs be increased to 24 by September 2024, 28 by 2025 and 32 by 2026. This will enable the Council to closely monitor the take-up of these places and adjust its plans if required.
7. **Additional Designated Provision Places are created** – over the next seven years it is proposed to increase the number of places in exiting Designated Provisions in consultation with Headteachers and DP Leaders gradually as follows:

School	Needs	ESFA	Actual	Proposed Changes			
		1-Sep-2023	1-Sep-24	1-Sep-25	1-Sep-26	1-Sep-27	
Bewsey Lodge Primary	Cognition and Learning	18	16	24	24	24	24
Dallam Community Primary	Autistic Spectrum Disorder	24	29	30	32	32	32
Gorse Covert Community Primary	Autistic Spectrum Disorder	8	8	16	16	24	24
Meadowside Community Primary	Cognition and Learning Development Centre	18	19	20	24	32	32
Oakwood Avenue Community Primary	Cognition and Learning	28	28	28	28	28	28
Woolston Community Primary	Autistic Spectrum Disorder	16	17	16	24	24	32
Bridgewater High School	Autistic Spectrum Disorder	25	24	25	25	25	25
Padgate Academy	Cognition and Learning	16	16	16	20	20	20
Penketh High School	Cognition and Learning	16	19	20	24	24	24
St Gregory's High School	Autistic Spectrum Disorder	16	16	16	16	16	16
Sir Thomas Boteler	Cognition and Learning	20	23	24	24	24	24
		<b>205</b>	<b>215</b>	<b>235</b>	<b>257</b>	<b>273</b>	<b>281</b>

8. **A review of the use of the Chaigeley site** – this is required to understand what changes can be made to increase the number of pupils which can be safely accommodated on the site in line with their PAN of 75.

9. **Consultation with Fox Wood School** – this is required to consider increasing the forms of entry in the school from one to two classes per year group which would increase the PAN to 156. To accommodate this, it is proposed that Fox Wood School occupy the free space created by the move of the sixth form to the Peace Centre and the space be reconfigured to accommodate this.
10. **Further work with Green Lane School to fully utilise the space** – a review of the use of the site is required to understand how best for pupils to fully utilise the space including those classrooms based on the second floor.
11. **Work with Woolston Brook School to improve their retention of pupils** – this includes investing in fabric of the building and the therapeutic offer supporting pupils with EHC Plans.
12. **ASD free school** – establish an Exceptional Provision to prevent pupils destined for the ASD Free School moving into independent places.

## 10. Financial implications

Ref	Existing Commitments	Type	Age	Additional Places	One off - £000k		Recurrent - £000k
					Capital	SEN Capital	High Needs Funding
1.	ASD Free School	Special	8-16	56	£350k		£1,200k
2.	The Peace Centre: <ul style="list-style-type: none"> <li>• Sixth Form Provision (16-19 years)</li> <li>• Supported Internships (19-25 years)</li> <li>• Adult Services (19 to 25 years)</li> </ul>	Special	16-19 19-25 19-25	20-60 40 50		£1,400k	£850k
3.	SEMH Designated Provision	Designated	11-16	16		£950k	£252k
<b>Sub-total</b>					<b>£350k</b>	<b>£2,500k</b>	<b>£3,317</b>
Ref	New proposals	Type	Age	Additional Places	One off - £000k		Recurrent - £000k
					Capital	SEN Capital	High Needs Funding
4.	Specialist Nursery Places	Special	3-4	12		£65k	£678k



5.	Additional Designated Provision Places	Designated	4-16	70		£500k	£1,200k increasing to £1,800k	
6.	Adaptation of Woolston Learning Village for Fox Wood School	Special	4-16	33		£100k	£561k	
7.	Review of the Chaigeley site	Special	8-16	30		£100k	000	
8.	Green Lane School	Special	8-16	20		£50k	£170k	
9.	Woolston Brook School	Special	8-16	-		£100k	000	
10.	Exceptional Provision	Exceptional	8-11	16		£100k	£260k	
					<b>Sub-total</b>		<b>£1,015</b>	<b>£2869</b>

# Report



<b>Report to:</b>	Schools Forum	<b>Item:</b>	5 (b)
<b>Date:</b>	08/10/2024	<b>For:</b>	Decision
<b>Title:</b>	Proposal to enhance the notional SEN budget for children coded as SEN Support		
<b>Author:</b>	Ellen Parry: Senior Education Improvement Manager	<b>Presenter:</b>	Ellen Parry

## 1. PURPOSE

1.1 The purpose of this report is to:

- Share information about the notional SEN budget for schools in Warrington.
- Seek Schools Forum approval for the development of a system of exceptional funding for children categorised as SEN Support to supplement school's notional SEN budgets to support more children to have their needs met in mainstream schools.

## 2. BACKGROUND

2.1 There is a requirement for local authorities to identify for each mainstream school in their area a 'notional' amount to guide schools in their spending to meet the costs of additional support for the school's pupils with special educational needs (SEN).

2.2 Although this is an indicative amount, the DfE believe it is important that it is sufficient for the reasonable additional costs that may be incurred by schools.

2.3 The [Children and Families Act 2014](#) secures the general presumption in law that children and young people with SEN should be educated in mainstream education settings. The [SEND and alternative provision green paper](#), published in March 2022, confirms that meeting SEN should remain a core part of mainstream schools' role in the future, and makes proposals on how schools will be supported in that role. The green paper also points to changes to the notional SEN budget in future, however at present, has not confirmed how this will look.

2.4 [The SEND Code of Practice](#), which is statutory guidance that schools must have regard, sets out more information on mainstream schools' current legal duties in relation to their pupils with SEN. Those duties include that schools must use their 'best

endeavours' to secure the special educational provision called for by a pupil's special educational needs.

2.5 In discharging that responsibility, amongst other expectations set out in the SEND Code of Practice, mainstream schools are expected to:

- meet the costs of special educational provision for pupils identified as on SEN Support in accordance with the SEND Code of Practice; and
- contribute towards the costs of special educational provision for pupils with high needs (most of whom have Education, Health and Care (EHC) Plans), up to the high needs cost threshold set by the regulations (currently £6,000 per pupil per annum). This cost threshold is calculated by reference to the additional costs of provision, above the costs of the basic provision for all pupils in the school. High needs top-up funding is provided above this threshold on a per-pupil basis by the local authority that commissions or agrees the placement.

2.6 All schools are expected to make 'reasonable adjustments' for pupils with disabilities, in accordance with their duties under the Equality Act 2010, whether or not they have SEN. Where a reasonable adjustment is special educational provision, the revenue cost of that adjustment may be met from the school's SEN budget.

2.7 Schools also have a duty to designate a teacher to be the SEN Co-ordinator (SENCo). The expectation is that the SENCo will be aware of their school's notional SEN budget and to be actively engaged with the senior leadership of the school in deciding what to spend on SEN support and provision.

### **3. THE NOTIONAL SEN BUDGET**

3.1 Mainstream maintained schools and academies are notified each year of a clearly identified but notional budget, within their overall budget allocation, towards the costs of fulfilling their duty to use their 'best endeavours' to secure that special educational provision for their pupils with SEN. Using funds from the schools block of the dedicated schools grant (DSG), local authorities are responsible for calculating the amount of this notional budget using their local mainstream schools funding formula factors.

3.2 There is currently no national approach to the calculation of schools' notional SEN budget through the National Funding Formula (NFF). Local authorities, working with their schools, use the local formula factor values in accordance with the funding regulations.

3.3 The requirement to identify this budget for their schools is set out in regulation 11(3) of [The School and Early Years Finance and Childcare \(Provision of Information About Young Children\) \(Amendment\) \(England\) Regulations 2024 \(legislation.gov.uk\)](#). The regulation states that "the local authority must identify within each budget share an amount calculated by reference to the requirements, factors and criteria specified in Part 3 [that

is, the various elements of the local schools funding formula] which are relevant to pupils with special educational needs; such amount must be calculated using a threshold sum of £6,000 per pupil below which the school will be expected to meet the additional costs of pupils with special educational needs from its [annual] budget share”.

- 3.4 The notional SEN budget is not a budget that is separate from a school’s overall budget. It is an identified amount within a maintained school’s delegated budget share or an academy’s general annual grant. It is intended as a guide for a school’s spending decisions, and is neither a target nor a constraint on a school’s duty to use its ‘best endeavours’ to secure special provision for its pupils with SEN.
- 3.5 Most local authorities calculate their schools’ notional SEN budget using a combination of funding from the basic entitlement factor, the deprivation factors, and the low prior attainment factors in the local funding formula. Depending on how the local formula is constructed and the overall weighting of the different formula factors, it is expected that the calculation of the notional SEN budget would include:

<b>Formula factors (listed here are those used in Warrington)</b>	<b>Weighting</b>
Small proportion of basic entitlement funding (AWPU)	3%
Proportion of EAL	25%
Large proportion of deprivation funding, reflecting the higher prevalence of lower-level SEN amongst disadvantaged pupils	50%
Majority or whole of the low prior attainment factor funding, as this is the best proxy for pupils with low-cost, high-incidence SEN	100%

- 3.6 Other elements of the funding formula may also be used – for example to reflect the prevalence of SEN amongst particular groups of pupils such as those who frequently move between schools, as captured by the ‘mobility factor’. A proportion of the lump sum could be used to reflect any fixed costs of making SEN provision that would apply to all local schools or diseconomies of scale relevant to small schools, however these are not currently used in Warrington’s notional SEN formula.
- 3.7 It is recognised that the formulaic calculation of schools’ notional SEN budgets, based on indicators of need used in the formula, is unlikely to be a precise match for the costs of support provided by teachers and other professionals for the pupils they identify as having SEN.
- 3.8 The notional SEN budget is not intended to provide £6,000 for every pupil with SEN, as most such pupils’ support will cost less than that. Nor is the notional SEN budget intended to provide a specific amount per pupil for those with lower additional support costs.

#### 4. IDENTIFICATION OF SEN SUPPORT

4.1 Schools identify those children with SEN Support (K-coded). According to the January 2024 school census, there were 2,417 children in Primary (12.93% of the cohort) and 1,706 children in Secondary (12.01% of the cohort) identified as SEN Support in Warrington.

4.2 The below table shows published data from June 2023 - % of SEN Support pupils:

	Primary			Secondary		
	2022	2023	Difference	2022	2023	Difference
Warrington	11.00	12.00	1.00	10.80	10.90	0.10
North West	13.30	13.80	0.50	12.20	12.70	0.50
Statistical Neighbours	11.66	12.12	0.46	11.04	11.64	0.60
England	13.00	13.50	0.50	11.90	12.40	0.50

Based on this, the proportion of children identified as SEN Support in Warrington is less than regionally and nationally, however is increasing year on year.

- 4.3 The proportion of children on SEN Support can differ widely between schools. Within Primary, figures range from 4.37% to 26.01% and within Secondary from 9.02% to 17.56%, with a greater proportion of SEN Support expected in schools located within areas of deprivation (Appendix 1 references Education Policy Institute research which highlighted significant inconsistencies in how children with special educational needs and disabilities in England are identified and supported).
- 4.4 Any significant mismatch in the proportion of children with SEN in one school compared to another may indicate that a school's approach to identifying pupils' SEN differs markedly from other schools' practice. In some schools, pupils not identified as having SEN may be identified as SEN elsewhere. Other schools may identify pupils as having SEN when their needs should be met within the normal teaching and learning environment.
- 4.5 In some cases, however, a significant mismatch between the notional SEN budget and actual costs of SEN support may be because the school has a disproportionate number of pupils with SEN in relation to its size, phase and characteristics, or has pupils with needs of a particular kind that are not captured by the formula factors used. In other cases a significant mismatch may be because a school's small size creates diseconomies of scale in making provision for pupils with SEN or that the area where a school is located does not attract a significant amount of deprivation or low prior attainment funding which form the bulk of the notional SEN budget.

## 5. PROPOSAL

- 5.1 This proposal is for the local authority to provide targeted funding from the high needs budget to schools in exceptional circumstances such as those illustrated in point 4.5. This funding would supplement the school's notional SEN budget as calculated under the local funding formula (Appendix 2 shows the notional SEN budget for each school and how this is split across their SEN cohort based on the October 2023 census data which was used for the funding formula).
- 5.2 The DfE states that local authorities can allocate supplementary targeted funding but need to carefully consider the criteria for allocating this. Local authorities cannot simply rely on how schools identify their pupils with SEN as this could lead to perverse incentives. There is currently different practice being applied to identification in schools with no clear understanding of factors leading to the identification of SEN Support across the system (Appendix 3 illustrates this by showing the difference between the October 2023 and the January 2024 school census figures for children with SEN, particularly noting the growth in SEN Support identification within Primary schools and therefore additional pressure on some schools).
- 5.3 With appropriate criteria in place, the DfE state that such funding could be particularly helpful. For example, it might enable local schools to meet the needs of more children with more complex needs instead of them being referred to special or independent schools.
- 5.4 A figure of £300,000 of exceptional targeted funding is proposed to support schools that either have a high number of SEN or those schools that do not draw down much deprivation funding which is a major SEN notional budget formula factor.
- 5.5 The criteria for accessing the funding will need to be developed and shared with schools in September 2024. A panel will be established to allocate funding. Guidance on what should and should not be recorded as SEN Support will be developed and linked into the SEND graduated response.
- 5.6 In order for schools to access this funding, they will be expected to:
  - 5.6.1 Implement the local authority criteria for the identification of children with SEN Support.
  - 5.6.2 Undertake a review of their SEN Support register in line with the local authority's criteria to ensure any discrepancies in identification and recording are corrected.
  - 5.6.3 Produce an end of year impact statement illustrating how the exceptional funding was used and how it benefitted the children within the school and wider Warrington community.

- 5.7 For this funding to continue in future years, the local authority expectation is that more children will remain in mainstream settings and there is a reduction in requests for placements in independent and special schools.
- 5.8 Additionally, it is proposed that when the local authority decides to issue an EHCP, Element 3 funding will be backdated to the date the EHC needs assessment was submitted to the local authority. This will ensure that schools are not expected to fund over and above the £6,000 notional SEN budget for children with EHCPs so that more funds from the schools allocated notional SEN budget are available for children at SEN Support.

## **6. DECISION MAKING**

- 6.1 There are no legal implications arising directly from this proposal. The proposal is intended to ensure that the local authority can support schools to fulfil their statutory obligations to enable all children to be educated in mainstream settings.
- 6.2 This proposal is not intended to lead to delays in assessing children or issuing EHC Plans.

## **5. RECOMMENDATIONS**

5.1 Schools Forum is asked to:

- Note the proposal outlined in section 5.
- Support the proposal.
- Identify a small group to work with the local authority to review the proposed criteria for accessing the funding.
- Identify two Headteachers or SENCos to represent schools on the decision making panel.

**Appendix 1 – Identifying pupils with special educational needs and disabilities, Education Policy Institute, March 2021**

[SEND-Identification 2021-EPI.pdf](#)

A study from the Education Policy Institute (EPI), funded by the Nuffield Foundation, highlights significant inconsistencies in how children with special educational needs and disabilities (SEND) in England are identified and supported.

The research, which is the first study to fully quantify how SEND support varies nationally, shows that access to support is decided by a “postcode lottery” – with the chances of receiving SEND support from the school or from the local authority largely dictated by the school that a child attends, rather than their individual circumstances.

Over a million children are currently registered as having special educational needs in England – with as many 4 in 10 of all pupils recorded as having SEND at some point during their time at school.

The longitudinal research, which tracks hundreds of thousands of pupils from a single year group through primary school, reveals that the huge variation in SEND support for children can be explained by inconsistent approaches to identifying children.

The findings show that pupils attending academy schools are less likely to be identified with SEND compared to other similar pupils, indicating that pupils’ needs may have been overlooked in these settings.

Children living in the most disadvantaged areas of the country are less likely to be formally recognised as having SEND than similar pupils in more affluent areas, highlighting how there is a “rationing of support” in many areas of high need.

The report also shows that many vulnerable pupils are more likely to be subject to SEND “under-identification”. Those moving schools and those frequently out of school, along with children who have suffered abuse or neglect, are all shown to have a reduced chance of being identified with SEND compared with otherwise similar children.

With the system for supporting SEND highly reliant on regular access to pupils over time, researchers conclude that the pandemic will likely have aggravated existing problems seen in SEND identification, with increasing numbers of more vulnerable children who need support falling under the radar of schools and authorities.



## Appendix 2 – Warrington schools – notional SEN budget

The number of children in Designated Provision have been removed from the figures below as the local authority funds the £6,000 for them, therefore their funding does not come from the SEN Notional budget

Element 3 (top-up) funding for children with EHC Plans is not included in the NFF figures below as these are separate to the schools funding calculations.

School	Funding 2024-25			Census - October 2023					Total SEN on roll		Use of Notional Funding	
	Total NFF	Notional SEN	Notional SEN % NFF	NOR October 2023 Census	SEN Pupils with EHCP	% with EHCP	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	£6,000 for children with EHCPs	Remaining SEN Notional Funding for SEN Support
Alderman Bolton Primary School	£1,508,338.06	£277,750.19	18%	267	4	1.33	48	16.00	52	19.48	£24,000.00	£253,750.19
Appleton Thorn Primary School	£951,081.35	£87,871.14	9%	194	8	4.12	33	17.01	41	21.13	£48,000.00	£39,871.14
Barrow Hall Community Primary School	£3,025,609.50	£241,350.57	8%	637	12	1.88	53	8.32	65	10.20	£72,000.00	£169,350.57
Beamont Community Primary School	£2,003,695.48	£356,484.14	18%	369	4	1.02	54	13.81	58	15.72	£24,000.00	£332,484.14
Bewsey Lodge Primary School	£1,869,717.00	£301,051.39	16%	308	6	7.14	28	8.00	34	11.04	£36,000.00	£265,051.39
Birchwood CofE Primary School	£942,858.61	£173,119.25	18%	155	1	0.59	18	10.65	19	12.26	£6,000.00	£167,119.25
Bradshaw Community Primary School	£950,626.32	£120,180.91	13%	184	4	2.17	20	10.87	24	13.04	£24,000.00	£96,180.91
Brook Acre Community Primary School	£1,261,059.04	£226,501.29	18%	205	3	1.35	58	26.01	61	29.76	£18,000.00	£208,501.29
Broomfields Junior School	£1,626,070.22	£202,873.03	12%	349	12	3.44	43	12.32	55	15.76	£72,000.00	£130,873.03
Bruche Primary School Academy	£1,033,598.00	£103,724.50	10%	217	1	0.40	25	10.08	26	11.98	£6,000.00	£97,724.50
Burtonwood Community Primary School	£1,035,549.61	£140,106.83	14%	205	0	0.00	19	9.27	19	9.27	£0.00	£140,106.83
Callands Community Primary School	£1,855,239.56	£207,599.56	11%	394	6	1.52	49	12.44	55	13.96	£36,000.00	£171,599.56
Chapelford Village Primary School	£2,770,782.30	£317,638.23	11%	598	9	1.51	66	11.04	75	12.54	£54,000.00	£263,638.23
Cherry Tree Primary School	£1,009,354.22	£119,413.47	12%	207	3	1.30	31	13.48	34	16.43	£18,000.00	£101,413.47
Christ Church CofE Primary School	£1,524,702.61	£193,589.56	13%	320	6	1.79	42	12.50	48	15.00	£36,000.00	£157,589.56
Cinnamon Brow CofE Primary School	£1,595,225.39	£254,185.76	16%	311	3	0.96	48	15.43	51	16.40	£18,000.00	£236,185.76
Croft Primary School	£990,508.00	£79,386.56	8%	214	10	4.67	20	9.35	30	14.02	£60,000.00	£19,386.56
Culcheth Community Primary School	£1,044,074.79	£116,088.14	11%	216	4	1.85	17	7.87	21	9.72	£24,000.00	£92,088.14
Dallam Community Primary School	£1,403,972.62	£321,397.43	23%	198	10	13.58	63	23.77	73	36.87	£60,000.00	£261,397.43
Evelyn Street Community Primary School	£1,731,816.60	£215,197.74	12%	315	6	1.78	36	10.68	42	13.33	£36,000.00	£179,197.74
Glazebury Church of England Primary School	£600,138.59	£67,050.94	11%	105	0	0.00	26	20.47	26	24.76	£0.00	£67,050.94
Gorse Covert Primary School	£1,097,242.77	£135,727.19	12%	218	6	5.78	15	6.67	21	9.63	£36,000.00	£99,727.19
Grappenhall Heys Community Primary School	£1,242,293.72	£92,740.50	7%	262	3	1.05	24	8.42	27	10.31	£18,000.00	£74,740.50
Grappenhall St Wilfrid's CofE Primary School	£1,938,969.82	£178,149.95	9%	419	3	0.72	27	6.44	30	7.16	£18,000.00	£160,149.95

School	Funding 2024-25			Census - October 2023					Total SEN on roll		Use of Notional Funding	
	Total NFF	Notional SEN	Notional SEN % NFF	NOR October 2023 Census	SEN Pupils with EHCP	% with EHCP	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	£6,000 for children with EHCPs	Remaining SEN Notional Funding for SEN Support
Great Sankey Primary School	£1,481,839.03	£148,205.09	10%	319	3	0.85	25	7.04	28	8.78	£18,000.00	£130,205.09
Latchford CofE Primary School	£942,263.63	£153,166.59	16%	164	4	2.29	27	15.43	31	18.90	£24,000.00	£129,166.59
Locking Stumps Community Primary School	£2,008,917.65	£307,019.67	15%	404	11	2.72	61	15.10	72	17.82	£66,000.00	£241,019.67
Meadowside Community Primary School	£1,370,054.59	£314,112.93	23%	206	1	6.64	70	25.83	71	34.47	£6,000.00	£308,112.93
Newchurch Community Primary School	£987,383.40	£119,320.12	12%	194	4	2.06	28	14.43	32	16.49	£24,000.00	£95,320.12
Oakwood Avenue Community Primary School	£3,186,676.49	£591,310.52	19%	605	7	5.26	123	17.96	130	21.49	£42,000.00	£549,310.52
Oughttrington Community Primary School	£1,800,308.61	£216,548.91	12%	389	7	1.80	43	11.05	50	12.85	£42,000.00	£174,548.91
Our Lady's Catholic Primary School	£952,528.80	£144,601.67	15%	169	7	4.14	29	17.16	36	21.30	£42,000.00	£102,601.67
Park Road Community Primary School	£948,480.40	£80,373.45	8%	205	4	1.95	12	5.85	16	7.80	£24,000.00	£56,373.45
Penketh Primary School	£987,102.22	£92,914.54	9%	210	3	1.43	25	11.90	28	13.33	£18,000.00	£74,914.54
Penketh South Community Primary School	£975,749.38	£103,335.37	11%	204	8	3.28	44	18.03	52	25.49	£48,000.00	£55,335.37
Ravenbank Community Primary School	£1,855,331.29	£193,430.31	10%	401	4	1.00	26	6.48	30	7.48	£24,000.00	£169,430.31
Sacred Heart Catholic Primary School	£1,044,164.13	£168,836.13	16%	189	8	4.23	35	18.52	43	22.75	£48,000.00	£120,836.13
Sankey Valley St James CE Primary School	£1,128,570.25	£140,284.64	12%	206	3	1.30	31	13.42	34	16.50	£18,000.00	£122,284.64
St Alban's Catholic Primary School	£1,081,443.12	£194,508.84	18%	189	1	0.48	30	14.35	31	16.40	£6,000.00	£188,508.84
St Andrew's CofE Primary School	£1,200,754.01	£222,161.42	19%	209	2	0.96	41	19.62	43	20.57	£12,000.00	£210,161.42
St Augustine's Catholic Primary School	£944,020.75	£160,535.93	17%	158	7	4.09	34	19.88	41	25.95	£42,000.00	£118,535.93
St Benedict's Catholic Primary School	£1,061,577.18	£145,504.73	14%	201	6	2.79	43	20.00	49	24.38	£36,000.00	£109,504.73
St Bridget's Catholic Primary School	£1,170,458.33	£210,721.82	18%	195	3	1.54	43	22.05	46	23.59	£18,000.00	£192,721.82
St Elphin's (Fairfield) CofE VA Primary School	£1,787,625.79	£287,014.03	16%	344	7	1.94	20	5.56	27	7.85	£42,000.00	£245,014.03
St Helen's CE Primary School	£596,062.77	£54,892.85	9%	111	3	2.70	8	7.21	11	9.91	£18,000.00	£36,892.85
St Joseph's Catholic Primary School	£1,163,045.55	£86,082.78	7%	251	4	1.59	16	6.37	20	7.97	£24,000.00	£62,082.78
St Lewis Catholic Primary School	£606,961.97	£57,303.89	9%	114	3	2.50	14	11.67	17	14.91	£18,000.00	£39,303.89
St Margaret's CofE VA Primary School	£2,105,485.21	£377,450.70	18%	412	4	0.86	47	10.15	51	12.38	£24,000.00	£353,450.70
St Monica's Catholic Primary School	£732,229.11	£53,278.27	7%	151	3	1.99	22	14.57	25	16.56	£18,000.00	£35,278.27
St Oswald's Catholic Primary School	£1,059,573.07	£111,368.28	11%	219	4	1.83	30	13.70	34	15.53	£24,000.00	£87,368.28
St Paul of the Cross Catholic Primary School	£670,195.94	£76,315.92	11%	120	6	4.80	24	19.20	30	25.00	£36,000.00	£40,315.92
St Peter's Catholic Primary School	£987,343.49	£89,623.59	9%	211	4	1.90	18	8.53	22	10.43	£24,000.00	£65,623.59
St Philip CofE Aided Primary School	£2,821,353.84	£285,263.03	10%	610	8	1.31	42	6.89	50	8.20	£48,000.00	£237,263.03
St Stephen's Catholic Primary School	£1,158,872.56	£199,272.80	17%	208	4	1.92	32	15.38	36	17.31	£24,000.00	£175,272.80
St Thomas' CofE Primary School	£981,520.22	£105,005.37	11%	204	5	2.18	10	4.37	15	7.35	£30,000.00	£75,005.37

School	Funding 2024-25			Census - October 2023					Total SEN on roll		Use of Notional Funding	
	Total NFF	Notional SEN	Notional SEN % NFF	NOR October 2023 Census	SEN Pupils with EHCP	% with EHCP	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	£6,000 for children with EHCPs	Remaining SEN Notional Funding for SEN Support
St Vincent's Catholic Primary School	£626,534.20	£62,534.82	10%	115	7	5.69	16	13.01	23	20.00	£42,000.00	£20,534.82
Statham Community Primary School	£906,528.01	£111,727.00	12%	178	7	3.93	16	8.99	23	12.92	£42,000.00	£69,727.00
Stockton Heath Primary School	£1,906,935.35	£208,021.38	11%	402	5	1.24	35	8.71	40	9.95	£30,000.00	£178,021.38
Stretton St Matthew's CofE Primary School	£962,924.80	£60,939.09	6%	208	1	0.48	19	9.13	20	9.62	£6,000.00	£54,939.09
The Cobbs Infant and Nursery School	£1,010,098.52	£116,461.72	12%	198	2	0.75	22	8.30	24	12.12	£12,000.00	£104,461.72
Thelwall Community Infant School	£642,363.57	£65,341.75	10%	123	3	2.44	17	13.82	20	16.26	£18,000.00	£47,341.75
Thelwall Community Junior School	£824,128.22	£84,562.03	10%	162	1	0.62	26	16.05	27	16.67	£6,000.00	£78,562.03
Twiss Green Community Primary School	£951,394.31	£81,063.50	9%	202	4	1.98	15	7.43	19	9.41	£24,000.00	£57,063.50
Warrington St Ann's CofE Primary School	£1,065,047.91	£205,894.44	19%	177	3	1.69	39	22.03	42	23.73	£18,000.00	£187,894.44
Warrington St Barnabas CofE Primary School	£1,016,068.78	£184,488.91	18%	167	2	1.20	23	13.77	25	14.97	£12,000.00	£172,488.91
Westbrook Old Hall Primary School	£1,761,224.70	£236,629.95	13%	367	10	2.72	45	12.26	55	14.99	£60,000.00	£176,629.95
Winwick CofE Primary School	£971,837.44	£103,880.73	11%	204	6	2.94	16	7.84	22	10.78	£36,000.00	£67,880.73
Woolston CofE Aided Primary School	£1,015,467.41	£103,297.07	10%	214	3	1.40	28	13.08	31	14.49	£18,000.00	£85,297.07
Woolston Community Primary School	£1,141,332.98	£159,736.06	14%	213	3	9.48	22	9.48	25	11.74	£18,000.00	£141,736.06
<b>Total Primary</b>	<b>£89,612,303.17</b>	<b>£11,803,520.94</b>	<b>13.17%</b>	<b>17569</b>	<b>329</b>	<b>1.87</b>	<b>2255</b>	<b>12.84</b>	<b>2584</b>	<b>14.71</b>	<b>£1,974,000.00</b>	<b>£9,829,520.94</b>
Beamont Collegiate Academy	£6,281,548.83	£1,007,931.45	16%	889	33	3.71	124	13.95	157	17.66	£198,000.00	£809,931.45
Birchwood Community High School	£6,049,173.28	£871,292.18	14%	893	20	2.20	160	17.56	180	20.16	£120,000.00	£751,292.18
Bridgewater High School	£10,163,455.53	£1,007,569.61	10%	1627	24	2.97	171	10.35	195	11.99	£144,000.00	£863,569.61
Cardinal Newman Catholic High School	£5,774,427.18	£803,145.03	14%	854	15	1.76	134	15.69	149	17.45	£90,000.00	£713,145.03
Culcheth High School	£7,419,190.97	£708,566.32	10%	1180	27	2.29	132	11.19	159	13.47	£162,000.00	£546,566.32
Great Sankey High School	£11,263,535.00	£1,033,475.38	9%	1869	26	1.25	188	9.02	214	11.45	£156,000.00	£877,475.38
King's Leadership Academy Warrington	£4,895,430.45	£475,138.08	10%	792	12	1.52	93	11.74	105	13.26	£72,000.00	£403,138.08
Lymm High School	£9,411,080.00	£861,790.50	9%	1560	54	2.82	194	10.13	248	15.90	£324,000.00	£537,790.50
Padgate Academy	£4,675,820.87	£822,711.40	18%	610	22	6.07	58	9.27	80	13.11	£132,000.00	£690,711.40
Penketh High School	£6,335,604.84	£824,503.45	13%	945	20	4.15	112	11.61	132	13.97	£120,000.00	£704,503.45
Sir Thomas Boteler CE High School	£6,035,614.70	£969,998.10	16%	829	22	5.17	143	16.80	165	19.90	£132,000.00	£837,998.10
St Gregory's Catholic High School	£7,580,491.60	£872,038.13	12%	1196	37	4.37	186	15.35	223	18.65	£222,000.00	£650,038.13
UTC Warrington	£1,605,431.71	£242,602.62	15%	197	8	2.89	33	11.91	41	20.81	£48,000.00	£194,602.62
<b>Total Secondary</b>	<b>£87,490,804.96</b>	<b>£10,500,762.23</b>	<b>12.00%</b>	<b>13441</b>	<b>320</b>	<b>2.38</b>	<b>1728</b>	<b>12.86</b>	<b>2048</b>	<b>15.24</b>	<b>£1,920,000.00</b>	<b>£8,580,762.23</b>

**Appendix 3 – Difference between October 2023 and January 2024 figures for EHC Plans and SEN Support (minus children in Designated Provisions)**

School	Census - October 2023				Total SEN on roll		Census - January 2024				Total SEN on roll		Difference between census	
	SEN Pupils with EHC	% with EHC	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	SEN Pupils with EHC	% with EHC	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	EHC	SEN Support
Alderman Bolton Primary School	4	1.33	48	16.00	52	19.48	7	2.33	49	16.28	56	21.29	3	1
Appleton Thorn Primary School	8	4.12	33	17.01	41	21.13	10	5.08	47	23.86	57	28.93	2	14
Barrow Hall Community Primary School	12	1.88	53	8.32	65	10.20	12	1.90	55	8.69	67	10.58	0	2
Beamont Community Primary School	4	1.02	54	13.81	58	15.72	6	1.50	73	18.30	79	21.12	2	19
Bewsey Lodge Primary School	6	7.14	28	8.00	34	11.04	9	2.91	36	10.08	45	14.56	3	8
Birchwood CofE Primary School	1	0.59	18	10.65	19	12.26	1	0.56	22	12.22	23	14.47	0	4
Bradshaw Community Primary School	4	2.17	20	10.87	24	13.04	4	2.15	19	10.22	23	12.37	0	-1
Brook Acre Community Primary School	3	1.35	58	26.01	61	29.76	3	1.32	71	31.28	74	36.10	0	13
Broomfields Junior School	12	3.44	43	12.32	55	15.76	14	4.02	42	12.07	56	16.09	2	-1
Bruche Primary School Academy	1	0.40	25	10.08	26	11.98	2	0.79	24	9.45	26	12.04	1	-1
Burtonwood Community Primary School	0	0.00	19	9.27	19	9.27	0	0.00	24	11.59	24	11.59	0	5
Callands Community Primary School	6	1.52	49	12.44	55	13.96	7	1.75	57	14.21	64	15.96	1	8
Chapelford Village Primary School	9	1.51	66	11.04	75	12.54	9	1.45	72	11.59	81	13.04	0	6
Cherry Tree Primary School	3	1.30	31	13.48	34	16.43	3	1.28	29	12.39	32	15.46	0	-2
Christ Church CofE Primary School	6	1.79	42	12.50	48	15.00	7	2.03	66	19.19	73	22.81	1	24
Cinnamon Brow CofE Primary School	3	0.96	48	15.43	51	16.40	4	1.27	57	18.15	61	19.43	1	9
Croft Primary School	10	4.67	20	9.35	30	14.02	11	5.12	21	9.77	32	14.88	1	1
Culcheth Community Primary School	4	1.85	17	7.87	21	9.72	5	2.30	14	6.45	19	8.76	1	-3
Dallam Community Primary School	10	13.58	63	23.77	73	36.87	14	7.14	49	18.01	63	32.14	4	-14
Evelyn Street Community Primary School	6	1.78	36	10.68	42	13.33	7	2.03	36	10.47	43	13.52	1	0
Glazebury Church of England Primary School	0	0.00	26	20.47	26	24.76	2	1.56	22	17.19	24	23.30	2	-4
Gorse Covert Primary School	6	5.78	15	6.67	21	9.63	7	3.21	15	6.67	22	10.09	1	0
Grappenhall Heys Community Primary School	3	1.05	24	8.42	27	10.31	3	1.01	24	8.08	27	10.19	0	0
Grappenhall St Wilfrid's CofE Primary School	3	0.72	27	6.44	30	7.16	4	0.95	29	6.86	33	7.80	1	2
Great Sankey Primary School	3	0.85	25	7.04	28	8.78	4	1.13	23	6.50	27	8.49	1	-2
Latchford CofE Primary School	4	2.29	27	15.43	31	18.90	4	2.17	30	16.30	34	19.88	0	3
Locking Stumps Community Primary School	11	2.72	61	15.10	72	17.82	14	3.45	60	14.78	74	18.23	3	-1
Meadowside Community Primary School	1	6.64	70	25.83	71	34.47	1	0.48	78	28.36	79	38.16	0	8
Newchurch Community Primary School	4	2.06	28	14.43	32	16.49	6	3.09	27	13.92	33	17.01	2	-1

School	Census - October 2023				Total SEN on roll		Census - January 2024				Total SEN on roll		Difference between census	
	SEN Pupils with EHCP	% with EHCP	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	SEN Pupils with EHCP	% with EHCP	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	EHCP	SEN Support
Oakwood Avenue Community Primary School	7	5.26	123	17.96	130	21.49	10	1.66	133	19.14	143	23.68	3	10
Oughtrington Community Primary School	7	1.80	43	11.05	50	12.85	13	3.28	53	13.38	66	16.67	6	10
Our Lady's Catholic Primary School	7	4.14	29	17.16	36	21.30	7	4.19	29	17.37	36	21.56	0	0
Park Road Community Primary School	4	1.95	12	5.85	16	7.80	5	2.44	11	5.37	16	7.80	1	-1
Penketh Primary School	3	1.43	25	11.90	28	13.33	3	1.43	25	11.90	28	13.33	0	0
Penketh South Community Primary School	8	3.28	44	18.03	52	25.49	8	3.19	47	18.73	55	27.09	0	3
Ravenbank Community Primary School	4	1.00	26	6.48	30	7.48	4	1.00	27	6.75	31	7.75	0	1
Sacred Heart Catholic Primary School	8	4.23	35	18.52	43	22.75	9	4.79	56	29.79	65	34.57	1	21
Sankey Valley St James CE Primary School	3	1.30	31	13.42	34	16.50	3	1.23	31	12.70	34	16.43	0	0
St Alban's Catholic Primary School	1	0.48	30	14.35	31	16.40	1	0.47	30	13.95	31	16.23	0	0
St Andrew's CofE Primary School	2	0.96	41	19.62	43	20.57	2	0.96	39	18.75	41	19.71	0	-2
St Augustine's Catholic Primary School	7	4.09	34	19.88	41	25.95	7	4.35	31	19.25	38	25.50	0	-3
St Benedict's Catholic Primary School	6	2.79	43	20.00	49	24.38	6	2.76	42	19.35	48	24.00	0	-1
St Bridget's Catholic Primary School	3	1.54	43	22.05	46	23.59	6	3.09	39	20.10	45	23.20	3	-4
St Elphin's (Fairfield) CofE VA Primary School	7	1.94	20	5.56	27	7.85	8	2.17	17	4.62	25	7.18	1	-3
St Helen's CE Primary School	3	2.70	8	7.21	11	9.91	3	2.73	8	7.27	11	10.00	0	0
St Joseph's Catholic Primary School	4	1.59	16	6.37	20	7.97	5	1.97	15	5.91	20	7.87	1	-1
St Lewis Catholic Primary School	3	2.50	14	11.67	17	14.91	4	3.42	17	14.53	21	18.92	1	3
St Margaret's CofE VA Primary School	4	0.86	47	10.15	51	12.38	5	1.05	46	9.70	51	12.26	1	-1
St Monica's Catholic Primary School	3	1.99	22	14.57	25	16.56	3	1.97	21	13.82	24	15.79	0	-1
St Oswald's Catholic Primary School	4	1.83	30	13.70	34	15.53	5	2.33	33	15.35	38	17.67	1	3
St Paul of the Cross Catholic Primary School	6	4.80	24	19.20	30	25.00	6	4.84	23	18.55	29	24.37	0	-1
St Peter's Catholic Primary School	4	1.90	18	8.53	22	10.43	4	1.89	18	8.49	22	10.38	0	0
St Philip CofE Aided Primary School	8	1.31	42	6.89	50	8.20	9	1.48	45	7.39	54	8.87	1	3
St Stephen's Catholic Primary School	4	1.92	32	15.38	36	17.31	4	1.93	35	16.91	39	18.84	0	3
St Thomas' CofE Primary School	5	2.18	10	4.37	15	7.35	5	2.19	9	3.95	14	6.93	0	-1
St Vincent's Catholic Primary School	7	5.69	16	13.01	23	20.00	9	7.20	16	12.80	25	21.74	2	0
Statham Community Primary School	7	3.93	16	8.99	23	12.92	9	5.08	14	7.91	23	12.99	2	-2
Stockton Heath Primary School	5	1.24	35	8.71	40	9.95	5	1.24	36	8.93	41	10.17	0	1
Stretton St Matthew's CofE Primary School	1	0.48	19	9.13	20	9.62	1	0.49	22	10.68	23	11.17	0	3
The Cobbs Infant and Nursery School	2	0.75	22	8.30	24	12.12	3	1.09	26	9.42	29	14.50	1	4

School	Census - October 2023				Total SEN on roll		Census - January 2024				Total SEN on roll		Difference between census	
	SEN Pupils with EHCP	% with EHCP	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	SEN Pupils with EHCP	% with EHCP	SEN Support	% SEN Support	Total pupils with SEN	% school roll with SEN	EHCP	SEN Support
Thelwall Community Infant School	3	2.44	17	13.82	20	16.26	4	3.23	17	13.71	21	16.94	1	0
Thelwall Community Junior School	1	0.62	26	16.05	27	16.67	1	0.62	26	16.15	27	16.77	0	0
Twiss Green Community Primary School	4	1.98	15	7.43	19	9.41	5	2.44	15	7.32	20	9.76	1	0
Warrington St Ann's CofE Primary School	3	1.69	39	22.03	42	23.73	3	1.66	43	23.76	46	25.41	0	4
Warrington St Barnabas CofE Primary School	2	1.20	23	13.77	25	14.97	4	2.37	25	14.79	29	17.16	2	2
Westbrook Old Hall Primary School	10	2.72	45	12.26	55	14.99	10	2.72	40	10.87	50	13.59	0	-5
Winwick CofE Primary School	6	2.94	16	7.84	22	10.78	7	3.43	15	7.35	22	10.78	1	-1
Woolston CofE Aided Primary School	3	1.40	28	13.08	31	14.49	5	2.35	27	12.68	32	15.02	2	-1
Woolston Community Primary School	3	9.48	22	9.48	25	11.74	4	1.86	22	9.40	26	12.09	1	0
<b>Total Primary</b>	<b>329</b>	<b>1.87</b>	<b>2255</b>	<b>12.84</b>	<b>2584</b>	<b>14.71</b>	<b>395</b>	<b>2.24</b>	<b>2395</b>	<b>13.59</b>	<b>2790</b>	<b>15.83</b>	<b>66</b>	<b>140</b>
Beamont Collegiate Academy	33	3.71	124	13.95	157	17.66	42	4.70	121	13.55	163	18.25	9	-3
Birchwood Community High School	20	2.20	160	17.56	180	20.16	23	2.57	156	17.09	179	20.00	3	-4
Bridgewater High School	24	2.97	171	10.35	195	11.99	24	2.96	175	10.57	199	12.21	0	4
Cardinal Newman Catholic High School	15	1.76	134	15.69	149	17.45	15	1.77	130	15.37	145	17.14	0	-4
Culcheth High School	27	2.29	132	11.19	159	13.47	26	2.21	144	12.22	170	14.43	-1	12
Great Sankey High School	26	1.25	188	9.02	214	11.45	28	1.50	188	9.02	216	11.56	2	0
King's Leadership Academy Warrington	12	1.52	93	11.74	105	13.26	13	1.65	92	11.66	105	13.31	1	-1
Lymm High School	54	2.82	194	10.13	248	15.90	59	3.79	165	8.62	224	14.39	5	-29
Padgate Academy	22	6.07	58	9.27	80	13.11	26	6.67	39	6.19	65	10.59	4	-19
Penketh High School	20	4.15	112	11.61	132	13.97	23	4.45	89	9.21	112	11.84	3	-23
Sir Thomas Boteler CE High School	22	5.17	143	16.80	165	19.90	26	5.62	150	17.56	176	21.15	4	7
St Gregory's Catholic High School	37	4.37	186	15.35	223	18.65	35	4.20	223	18.38	258	21.55	-2	37
UTC Warrington	8	2.89	33	11.91	41	20.81	12	6.19	34	12.59	46	23.71	4	1
<b>Total Secondary</b>	<b>320</b>	<b>2.38</b>	<b>1728</b>	<b>12.86</b>	<b>2048</b>	<b>15.24</b>	<b>352</b>	<b>2.62</b>	<b>1706</b>	<b>12.69</b>	<b>2058</b>	<b>15.31</b>	<b>32</b>	<b>-22</b>

End of report

# REPORT



**WARRINGTON**  
Borough Council

<b>Report to:</b>	Schools Forum	<b>Item:</b>	6
<b>Date:</b>	08/10/24	<b>For:</b>	Information
<b>Title:</b>	Growth Addition Fund (GAF) update		
<b>Author:</b>	Mark Sarjent	<b>Presenter:</b>	Mark Sarjent

## Growth Addition Fund (GAF) update for Schools Forum: October 2024

### 1. Criteria for eligibility for GAF

- 1.1 As agreed at previous School Forums meeting, all applications or projects to be assessed to the GAF criteria listed below and recommended from school organisation team to Schools Forum for decision.

Criteria	
<b>A</b>	School must have agreed an expansion or additional places with school organisation team to take additional pupils, which may or may not also involved capital investment.
<b>B</b>	VA schools or Academies must have a signed funding agreement in place in order to access the growth fund or cabinet report for community schools.
<b>C</b>	Expansion or additional places will be 10% or more of total places or per year group places offered, depending on type of expansion.
<b>D</b>	Growth addition can be used for temporary or permanent places whether bottom up from new reception or new year 7, or made available in existing year groups
<b>E</b>	Growth addition can only be used for creation of additional places, not the filling of vacant places by new pupils. Vacant places are generally defined by the original PAN on entry for the cohort, unless alternative places figure is to be used.
<b>F</b>	Schools that have lowered PAN or removed places will not be eligible for growth funding to admit above the lowered PAN for three years unless exceptional criteria* exist.
<b>G</b>	Schools who operate a lower PAN but regularly overadmit will be ineligible for funding (oversubscribed schools) unless exceptional criteria* exist.

*\* Examples of exceptional criteria, but not limited to: buildings unfit for education or condemned causing PAN changes, recovery from situations necessitating a lower PAN such as fire or flood, and significant unexpected intakes beyond what is 'normal' or forecast requiring reactive changes.*

- 1.2 At the Growth Addition sub-group meeting, members discussed a change to criteria C which most projects will qualify for. It was felt that criteria C was not strong enough, and projects should only be funded where the school incurs additional revenue costs such as employment of a staff member.

- 1.3 Hence after discussion, the new agreed elongated wording for criteria C is being brought to Schools Forum for adoption: *An expansion or additional places will be 10% or more total places or per year group offered, depending on type of expansion, resulting in the need for additional staffing costs, most likely a teacher, or as agreed with the School Organisation Team.*

## **2. Growth Addition Fund Updates**

- 2.1 Following allocations of projects in 2023/24, the total remaining allocation was £207,896.
- 2.2 Since the Schools Forum decision to allocate GAF last year, one project did not proceed as anticipated and the allocated funding was clawed back into the pot, GAF now standing at £242,558.
- 2.3 The decision to reserve funding for future years was in case there was no more funding available in future years. This has turned out to be true as due to expenditure on high needs, there is no top-up to the GAF for 2024/25.
- 2.4 In the last GAF paper presented to Schools Forum at a previous meeting, three future projects were listed at three schools. None of these three projects are proceeding, therefore these projects will be removed from future communications.
- 2.5 There are no new projects to update Schools Forum on at this time, therefore no allocations have been proposed from the fund. GAF remains available to future projects with particular focus on the Council's proposed increases for 2026 secondary intake which will likely qualify for funding.