

# Schools Forum

## PLEASE NOTE TIME OF MEETING

Tuesday, 21st January, 2025  
at 4.00 pm

Virtual Meetings - Virtual meeting

This meeting is open to the public

LEAD OFFICER  
Clodagh Freeston

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## AGENDA

### 1 **WELCOME, APOLOGIES AND CHANGES IN MEMBERSHIP (IF ANY)**

### 2 **MINUTES OF PREVIOUS MEETING** (Pages 1 - 8)

Minutes of the meeting held on 23<sup>rd</sup> September 2009, attached.

### 3 **DECLARATIONS OF INTEREST**

In accordance with the Localism Act 2011, and the Council's Code of Conduct, Members to disclose any personal or pecuniary interests in any matter included on the agenda for this meeting.

NOTE: Members are reminded that, where applicable, they must complete the appropriate form recording details of any such interests and hand it to the Democratic Support Officer.

### 4 **MATTERS ARISING**

To consider Matters Arising from the previous meeting.

### 5 **RATIONALE AND IMPACT OF THE TRANSFER OF FUNDS FROM SCHOOLS BLOCK TO CENTRAL SCHOOL SERVICES BLOCK (CF)** (Pages 9 - 22)

To provide rationale and accountability measures for the impact of the financial transfer from the Schools Block to the Central School Services Block, to consider the continuation of this transfer.

### 6 **EXPLANATORY NOTE ON THE MATTER OF SCHOOL ADMISSIONS LINE IN CENTRAL SERVICES BLOCK (MATTER ARISING) - ZS** (Pages 23 - 46)

Review of Delegated School Budget Allocations for Admission Services by a Schools Forum delegate.

### 7 **LOCAL FUNDING FORMULA 2025-26 (SW)** (Pages 47 - 54)

To advise Schools Forum about the services funded from the Central Services Block (CSSB) in 2025/26 and the approvals required by Schools Forum. Also, to update the Schools Forum on the latest 2025/26 funding arrangements announced by the DfE, which provides Schools Forum the detailed funding options to be considered for approval. The Schools Forum is requested to deliberate and decide on key matters concerning the allocation of the Schools Block for the 2025/26.

### 8 **SCHOOLS IN FINANCIAL DIFFICULTY GRANT**

To note a report detailing the proposed distribution of the schools in financial difficulty grant.

**9 EARLY YEARS BLOCK UPDATE (Pages 55 - 56)**

To provide information on initial 2025/26 early years budgets announced in December 2024 by the Education & Skills Funding Agency (ESFA).

**10 SEND/HIGH NEEDS BLOCK UPDATE (JH) (Pages 57 - 66)**

The Forum is asked to note; the updated EHCP demand forecast, the current position on the High Needs Block and deficit and, the HNB projections for next year and pressures moving forward. Additionally, the Forum is asked to note; the report on the Time Limited Mainstream Inclusion Grant and updates on the £740m capital grant for mainstream school enhancements and resourced provisions.

**11 ANY OTHER BUSINESS AND CLOSING REMARKS AND DATE OF THE NEXT MEETING**

The next meeting of Schools Forum is Wednesday 2 April 2025, 4pm to 6pm.

Monday, 13 January 2025

Service Lead, Education and Early Help,

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# Agenda Item 2

## SCHOOLS FORUM

### MINUTES OF THE MEETING HELD ON WEDNESDAY, 11TH DECEMBER 2024

#### PRESENT:

<b>Primary Schools</b>	
John Draper	Headteacher – Swaythling Primary
Peter Howard	Headteacher – Fairisle Junior (Vice-Chair)
Mac Macbride	Primary Governor – Banister
Maria Whitmarsh	Oaklands Primary School (Added 11 December 2024)
<b>Secondary Schools</b>	
Jim Henderson	Headteacher Woodlands Community College
Harry Kutty	Headteacher – Cantell (Chair)
Roger Peplow	Governor St Georges
<b>Academy</b>	
Sean Preston	Hamwic Trust
<b>Special Schools</b>	
Andy Evans	Headteacher – Great Oaks School
Ben Penfold	Acting Headteacher – Vermont School
<b>Pupil Referral Unit (PRU)</b>	
Debbie McKenzie	Headteacher – Compass School
<b>Early Years Provision</b>	
Anna Wright	PVI for Early Years
<b>Non-Schools</b>	
Rob Sanders	Diocese of Winchester
<b>Non-voting attendees</b>	
<b>Observers</b>	
Bruno Duckworth-Russell	NEU (Added 28/11/24 following Teachers Liaison Panel)
<b>SCC Officers</b>	

Clodagh Freeston	Head of Education Services
Juno Hollyhock	Service Manager - Special Educational Needs and Disability
Darrin Hunter	Early Years Manager
Zoe Snow	Strategic Lead for Education Access
Steve Wade	Finance Business Partner

## **1. MINUTES OF PREVIOUS MEETING**

RESOLVED that the Minutes of the meeting held on 25<sup>th</sup> September 2024 be noted and approved as a correct record having noted the following amendments.

- i. Mike Adams was not present at the meeting.
- ii. Kevin Barnet had been noted as Bennet.

## **2. DECLARATIONS OF INTEREST**

The Forum agrees that all Members would complete the Declaration form and return to the Democratic Support Officer by 20 December 2024. Forms should be returned via AnyComms to Zoe Snow.

## **3. EXECUTIVE SUMMARY**

The Forum received a verbal report from the Head of Education Services about vital partnerships across city, the provision of data and context of data to shape policy and practice across key areas. The Forum also received information about the Education redesign within SCC, which was in the early stages and going to consult in January. Priorities included –

- i. Reduction of absence, reduction of exclusions and raising attainment.
- ii. SEND demand.
- iii. Early Years support of a new suite of provision in line with Govt policy.
- iv. Helping schools in financial difficulty.

## **4. SCHOOLS FORUM MEMBERSHIP**

The Forum considered membership and outstanding vacancies. It was agreed to follow up further membership for Academies.

## **5. MATTERS ARISING**

In discussion of the Matters Arising the following was agreed:

To add names of members against matters arising items on future agendas.

a) Rationale/Impact of the transfer of funds from SB to CSSB:

- i. Impact reports to be submitted to January meeting about where money is going specifically, including information on funding to meet statutory requirements and the impact on children.
- ii. Decision to be made in January following due diligence and consultation.
- iii. Submit reports through the year on the impact on children in the city.

b) Impact of restructuring on budget - (CF)

Report to be submitted to the January Meeting.

c) Pressures on HN block and any potential impact planned or otherwise

- i. Updated table needed for the record.
- ii. Report to be submitted to the January meeting on the current position with high needs block and deficit. What is projected for next year and what the pressures are moving forward?

d) Schools in Deficit Grant - funding formula used.

Formula provided but SW to provide an in year forecast, to address specific information of deficit, recovery plans, and key criteria on allocating funding.

## **6. TRANSFER FROM SCHOOLS BLOCK**

The Forum received a briefing paper on the Transfer from Schools Block. It was agreed that the vote would be carried forward to the January meeting once the Due Diligence had been carried out as per the Matters Arising.

## **7. TECHNICAL ADJUSTMENT FOR PFI - DECISION REQUIRED**

The Schools Forum was asked to vote on the Technical Adjustment for PFI schools. Following a discussion it was agreed that if there was no technical adjustment PFI schools would not be protected. The vote was carried unanimously.

## **8. UNION DE-DELEGATION**

The Schools Forum was asked to vote on the de-delegation of schools budget to fund trade union activity. It was agreed that:

- i. Funding was in balance at present.
- ii. The vote would be moved to the January meeting.
- iii. SW and CF would discuss with HR, Union and TLP on the proposal on which to vote.

## **9. CHANGES TO THE SCC SEVERANCE & PENSIONS PAYMENTS: DISCRETIONARY EXCEPTIONS POLICY**

The Forum discussed the changes to the SCC Severance & Pensions Payments: Discretionary Exceptions Policy and agreed that:

- i. CF would discuss with Chris Bishop what the process was, what it should be, and the current position.
- ii. CF would talk to Head of HR and CB and invite CB to the next meeting.
- iii. CF would forward PH's email to CB.

## **10. STANDING ITEM: LA UPDATE ON DFE/ESFA FUNDING ANNOUNCEMENTS**

The Forum considered an update on any DFE/ESFA funding announcements.

## **11. NATIONAL FUNDING FORMULA UPDATE**

The Forum considered the briefing, which provided an overview of the recent 2025–26 Schools and High Needs National Funding Formula updates. The Forum noted that:

- i. There was no structural change to funding formula.
- ii. Increase of 2% central services block includes additional grants received this year in school budget grant.
- iii. High needs increase of 9%.
- iv. Govt announcement on increased funding of high needs.
- v. SPRB recommending that schools use efficiency to cover staff salary increase.

## **12. SCHOOLS FORUM FORWARD PLAN**

The Forum considered the proposed forward plan of activity over the 2025/26 financial year.

## **13. ANY OTHER BUSINESS, CLOSING REMARKS AND MEETING DATES**

It was noted that the All Phases Headteacher Meeting would take place on 21 January 2025.

It was agreed that CF would send out meeting information to everyone for the face to face meeting including the link for the hybrid meeting shared by the Chair of Governors.

Next Schools Forum meeting: Tuesday 21 January 2025, 4pm-6pm



SCHOOLS FORUM – 11 December 2024

Title of Item	Action Agreed		Timescale	Responsible Officer	Status
	<i>Recommendations in report approved./ Modified Decision to include the following additional recommendation to those in the report approved</i>				
3 Minutes of Previous Meeting	Errors: Mike Adams was not present at the meeting.  Kevin Barnet – Mistake: Bennet on minutes.		January 2025	Maria McKay/Ed Grimshaw	
4 Declarations of Interest	All Members to complete the Declaration form and return to Democratic Support Officer by 20 December 2024. Return via AnyComms to Zoe Snow.		20 December 2024	All Members	
5 Executive Summary	Received for information - No further action		Ongoing	Clodagh Freeston	Rob Henderson to attend Jan meeting.
6 Schools Forum Membership	Follow up further membership for Academies		January 2025	Maria McKay	
7 Matters Arising	Add names of members against matters arising items on future agendas.  <u>a) Rationale/Impact of the transfer of funds from SB to CSSB:</u> i. Impact reports to be submitted to January meeting about where money is going specifically, including information on funding to meet statutory requirements and the impact on children. ii. Decision to be made in January following due diligence and consultation.		Ongoing  January 2025 & Ongoing meetings.	Maria McKay  Steve Wade/Clodagh Freeston	

Title of Item	Action Agreed		Timescale	Responsible Officer	Status
	<p>iii. Submit reports through the year on the impact on children in the city.</p> <p><u>b) Impact of restructuring on budget - (CF)</u></p> <p>Report to January Meeting.</p> <p><u>c) Pressures on HN block and any potential impact planned or otherwise</u></p> <p>i. Updated table needed for the record.</p> <p>ii. Report to be submitted to January meeting on current position with high needs block and deficit. What is projected for next year and what are the pressures moving forward?</p> <p><u>d) Schools in Deficit Grant - funding formula used.</u></p> <p>Formula provided but need SW to provide an in year forecast, to address specific information of; deficit, recovery plans, and key criteria on allocating funding.</p>		<p>January 2025</p> <p>January 2025</p> <p>January 2025</p>	<p>Clodagh Freeston</p> <p>Juno Hollyhock</p> <p>Steve Wade</p>	
8 Transfer From Schools Block	Vote carried forward to January meeting once Due Diligence to be carried out (see Matters Arising above).		January 2025	Steve Wade	
9 Technical Adjustment For PFI - Decision Required	Vote on technical adjustment carried unanimously.			Steve Wade	
10 Union De-Delegation	Funding in balance at present. Vote moved to January meeting. SW and CF to discuss with HR, Union and with TLP on proposal to vote on.		January 2025	Steve Wade/ Clodagh Freeston	CB to attend Jan mtg.
11 Changes To The SCC Severance & Pensions Payments: Discretionary Exceptions Policy	CF to discuss with Chris Bishop to find out what the process was, what it should be and current position. CF to talk to Head of HR and CB and invite CB to next meeting.		January 2025	Clodagh Freeston	Spoken to CB. Verbal update

Title of Item	Action Agreed		Timescale	Responsible Officer	Status
	CF to forward PH's email to CB.				from CB at Jan mtg.
12 Standing Item: LA Update on DFE/ESFA Funding Announcements	Received for information - No further action				
13 National Funding Formula Update	Received for information - No further action				
14 Schools Forum Forward Plan	Received for information - No further action				
16. AOB	All Phases Headteacher Meeting on 21 January 2025.  CF to send out meeting information to everyone for face to face meeting including the link for the hybrid meeting shared by the Chair of Governors.		10 January 2025	Clodagh Freeston	
<b>Schools Forum Agenda Briefing 7 January 2025 4pm</b>  <b>Schools Forum Tuesday 21 January 2025 4pm-6pm</b>					

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# Agenda Item 5

**SUBJECT:** Rationale and Impact of the Transfer of Funds from Schools Block to Central School Services Block

**DATE:** 21<sup>st</sup> January 2025

**RECIPIENT:** Schools Forum

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## SUMMARY:

1. Schools Forum have requested a rationale and accountability measure for the impact of the transfer of £0.220M from the Schools Block to the Central School Services Block to consider the continuation of this transfer.

## BACKGROUND

2. The Central School Services Block (CSSB) was set up following the discontinuation of the Education Services Grant (ESG). The retained funding is to support the Local Authority's (LA) statutory duties for all schools.
3. The CSSB provides funding for Local Authorities to carry out central functions on behalf of maintained schools and academies, comprising two distinct elements:
  - Historic commitments – DSG MASH Contribution (Preventative Social Care) is a historic commitment. The EFSA have reduced funding for historic commitments each year since 2021/22 by 20%.
  - Ongoing responsibilities – these include School Admissions, National Copyright Licences and Statutory Regulatory duties, including Education Welfare and Attendance.
4. Due to reductions in the CSSB funding, starting in 2022, Schools Forum agreed to a block transfer from the Schools Block to ensure that Local Authority Education Services remained at the same level.
5. The arrangements for this transfer from 2022-2024 were as follows:

<b>Year</b>	<b>Reduction in CSSB Funding - Year</b>	<b>Reduction in CSSB Funding Cumulative</b>	<b>Amount Transferred from Schools Block</b>
2022/23	£0.103M	£0.103M	£0.103M
2023/24	£0.083M	£0.186M	£0.186M
2024/25	£0.050M	£0.236M	£0.220M

6. Although there has been an increased to the CSSB allocation this year, this is due to the Education and Skills Funding Agency (ESFA) confirmation that the Teachers' Pay Additional Grant (TPAG), the Teachers' Pension Employer Contribution Grant (TPECG) 2024, and the recently announced Core Schools

Budget Grant (CSBG) will all be rolled into the schools NFF for 2025/26 and thus will not be paid as a separate grant.

7. The 2025/26 CSSB fund is showing a 4% reduction from the 2024/25 fund.
8. The cumulative reduction to the CSSB fund from 2022 is now £0.316M.

While previous transfers from the Schools Block have increased year on year to address the increasing cumulative reduction, the Local Authority is not requested an increase to the request of the amount to be transferred from the amount transferred in the 2024/25 financial year. Instead a transfer of the same amount of £0.220M is being requested. This is 70% of the cumulative funding reduction.

9. Transfers of up to 0.5% from the Schools Block to other Designated School Grant blocks are permitted with Schools Forum approval.

The requested 0.220M transfer equates to a transfer of 0.11%.

#### **LOCAL AUTHORITY EDUCATION SERVICES REDESIGN**

10. Schools Forum minutes reflect that initial transfers from the Schools Block to the CSSB were to ensure the Local Authority did not need to reduce the services offered to schools in light of reductions to the CSSB. The minutes note a significant contribution from the Local Authority general fund to further support the delivery of key functions.
11. The transfer from the Schools Block to the CSSB made for the 2024/25 was agreed on the basis of schools being in agreement with the direction of travel in Education Services redesign by the Local Authority undertaken in 2024.

The redesign at this time needed to be undertaken to resolve an overspend in the Education Services budget.

12. The redesign came into operation in June 2024, however as key roles were not recruited to, an interim structure was agreed with plans to undertake a further redesign better organised to meeting the needs of schools and address forecasted cost pressures existing in the structure.

The second redesign process was undertaken in the Autumn Term of 2024 to meet the priorities of the service and address the forecasted budget pressures.

13. Options were presented to Headteacher and Principal delegates, elected to represent groups of school.

This group unanimously supported the proposed redesign that opened for consultation on 7th January 2025.

14. The proposed redesigned Education Service has been crafted to allow the Local Authority to both meet its statutory duties and to be responsive to the needs and priorities of schools, as determined by both internal review and stakeholder engagement.

The agreed areas of specific focus for the Local Authority Education Service are:

- Improving educational outcomes, including the insurance of appropriate pathways for children and young people, rather than a focus simply on academic results.
  - Improving educational engagement, including improving school attendance
  - Improving the response to increasing behaviour-presenting need, to reduce suspension and exclusion.
15. The proposed redesign has been designed with the 0.220M transfer included, on the basis of the continuity principle of this transfer being to avoid a reduction in services delivered.

No increase to this transfer amount has been suggested.

Should this transfer not occur, this structure would need to be significantly adjusted, which would impact the offer of services to schools against the principles of the redesign.

16. A high-level summary of the comparison between the current Education Services structure following the 2024 redesign, and the proposed redesign under consultation, alongside the case for the proposed redesign, is presented in Appendix A.

## **ACCOUNTABILITY OF BLOCK TRANSFERRED FUNDS: CURRENT POSITION**

17. Previous transfers from the Schools Block to the CSSB had been made on the basis of allowing the Local Authority to continue service levels without reduction in what is offered to schools as a result of reduction to core CSSB funding.

This has included key statutory functions for the Local Authority, as well as delegated services.

18. The transfers made to the CSSB from the Schools Block were thus used to maintain Local Authority Education Services, in line with national policy shifts, and provide delivery of work such as:
- Education Welfare, including the preparation for increased statutory functions as of summer 2024;
    - i. This has included sign-off from the DfE Attendance advisor in preparation for the new duties, stating: *A huge thank you for all the work you have done over the last couple of years -veritable*

*mountains have been moved. You have now reached a point where you are deemed to be "green" on your self-assessments and so no further individual sessions will be provided by me as a matter of course. A testament to your successes.*

- ii. School Attendance Action Groups (SAAG) to connect multi-disciplinary professionals and share information and best practice.
  - iii. See attached case studies for demonstration of the impact of school attendance support (Appendix B)
- Increased oversight for potentially vulnerable groups such as Children Missing Education and EHE cohorts, ensuring reintegration to school was successful where need for this was identified;
  - i. This has included the reintegration of 18 Year 8-11 longer term EHE pupils where EHE was not sustainable for families to school in the 2023/24 academic year.
- Exclusion and reintegration work in response to rising presentation in need;
  - i. The four highest priority schools for behaviour intervention identified in the 2023/24 academic year have seen a 53% reduction in their use of suspension in this term compared to the previous term;
  - ii. There has been a 62% reduction in the number of permanent exclusions in this term compared to the previous term.
- School Improvement developments, such as moderation management, Alternative Provision quality assurance, School Improvement Partners quality assurance and curriculum intervention project work;
  - i. A key example of this work is the impact of the Writing Intervention Project that saw significant gains of 9% in the participating schools, raising Southampton's overall writing progress by 1.13%, topping all other Local Authorities by considerable margin in this measure.
- Support for pupils with medical conditions, including those not well enough to attend school;
  - i. This has included innovative practice such as the use of AV1 robots to allow pupils with medical conditions that mean they cannot physically attend school for periods of time to remain part of their school communities.
- Educational Psychology support, including the establishment of Specialist Educational Psychologists particularly supporting Care Experienced Children and Young People, Post-16 and SEMH;
  - i. Formalised links and processes with Educational Psychology support for the Youth Justice Service;
  - ii. The establishment of a Mental Health Matters forum for Senior Mental Health Leads in schools and other educational settings;
  - iii. Targeted Specialist EP work through functions such as PHIG problem solving and therapeutic intervention pilots.

## **ACCOUNTABILITY OF BLOCK TRANSFERRED FUNDS: FUTURE PLANNING**



19. Schools Forum have requested an accountability measure to be attached to any proposal for block transfers, to be satisfied that the impact of such transfers aligns to the city's shared educational priorities.
20. To allow for appropriate oversight by Schools Forum, the Local Authority are suggesting the following application of the proposed £0.220M transfer to activity provided in the proposed redesign as follows:

Contribution to deregistration and penalty notice administration and legal representation in court proceedings	0.023
Contribution to Specialist Educational Psychology services	0.043
Contribution to strategic planning, for overall Education Service and for Education Access & Integration strategic delivery	0.045
Contribution to delivery of Education Integration activity for pupils at risk of disengagement	0.069
Contribution to strategic planning and delivery of Education Standards activity for support of curriculum, teaching and leadership development	0.040

21. The Local Authority proposes to provide regular updates to Schools Forum on the direction of travel on key priorities, with a more in-depth presentation ahead of budget determination meetings, to provide accountability to both the Central School Services Block and specifically the requested £0.220M transfer.

Details on the accountability and success measures for the services proposed in the Education Services redesign are provided in Appendix A, as part of the redesign rationale.

The Local Authority propose to provide both a narrative as to services delivered, including case studies where this is appropriate, for both statutory and non-statutory services. Further to this, a comprehensive data analysis will be provided to interrogate the impact of services and how these are being prioritised.

Any projected underspend or overspend, the narrative behind this, and any mitigation being undertaken will also be communicated to Schools Forum.

#### **RISKS OF TRANSFER NOT BEING AGREED**

22. Should Schools Forum not agree to the proposed £0.220M transfer from the Schools Block to the Central School Services Block, there would need to be an amendment to the proposed redesign and the service plan to be delivered under it.
23. To avoid the creation of additional cost pressures incurred through any redundancy processes, vacant roles would be prioritised for removal to make

the £0.220M reduction. This would also remove an element of the risk of funding positions through a presumption of transfers between blocks, which can only be agreed annually.

While the specific details of this process would be determined by the nature of the agreement to the transfer, whether the transfer is not agreed altogether, or a reduced amount is agreed, it is likely that that following changes would be made to the proposed redesign:

The removal of the vacant strategic Director of Education post	0.126
Reduction to legal support, notably legal representation	0.016
Reduction to Education Access services, including navigation of deregistered pupils and CME and EHE support	0.036
Reduction to Education Integration services, including Attendance Support, Exclusion & Reintegration and Pupils with Medical Conditions	0.040

## RECOMMENDATIONS

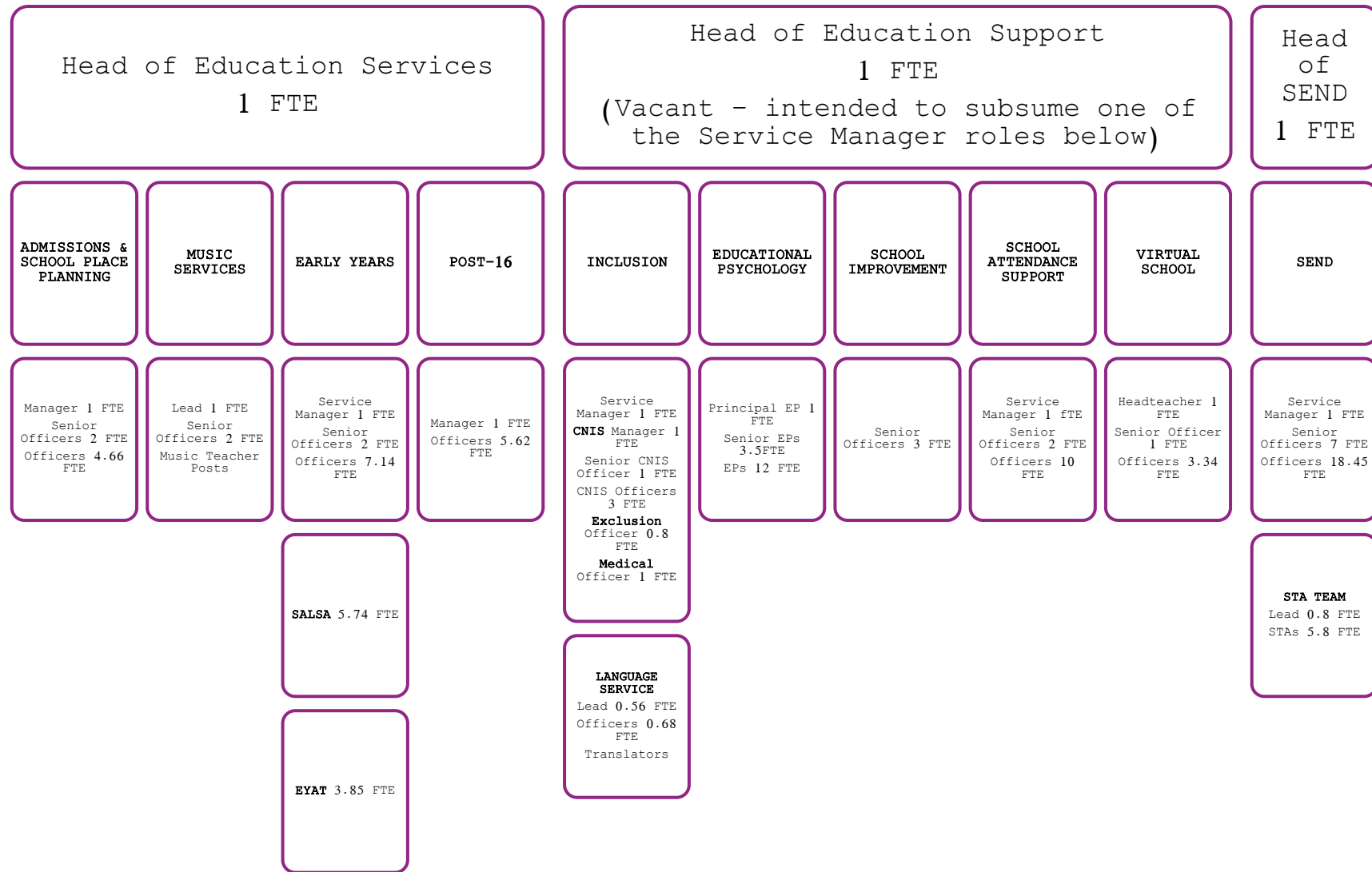
24. The recommendation of the Local Authority is for the £0.220M transfer from the Schools Block to the Central Schools Services Block be agreed by School Forum for the 2025/26 financial year.
25. While previously the value of the transfer from the Schools Block to the Central School Services Block had previously increased annually, the Local Authority is not recommending an increase to the value of the transfer from the level for the 2024/25 financial year.
26. The Local Authority is recommending that while the transfer be agreed for the 2025/26 financial year, that further investigation is given to ways that would allow the Local Authority not to be reliant on such transfers.

This is likely to include an increased reliance on income generation, and so appropriate balance must be given to the per-school contribution to the current transfer amount and any fees charged for services in its absence.

<b>Further Information Available From:</b>	<b>Name:</b>	Clodagh Freeston
	<b>Email:</b>	Clodagh.freeston@southampton.gov.uk

**Appendix A: High Level Summary of Education Services Structure 2024 and Proposed Redesign for Consultation in January 2024**

Current Structure Summary:



Proposed Structure Summary:

Director of Education  
1 FTE

Head of Education  
1 FTE

Virtual School  
Headteacher  
1 FTE

Head of  
SEND  
1 FTE

**EDUCATION ACCESS & INTEGRATION**

Service Manager 1 FTE  
Team Manager 3 FTE  
Senior Officers 7.8 FTE  
Officers 21 FTE

**EDUCATION STANDARDS**

Service Manager 1 FTE  
Team Manager 2 FTE  
Senior Officer 2 FTE  
EYAT 3.85 FTE  
Music Teacher Posts

**EDUCATIONAL PSYCHOLOGY**

Principal EP 1 FTE  
Senior EPs 3.5FTE  
EPs 12 FTE  
SALSA 5.74 FTE

**EARLY YEARS & FAMILY HUBS**

Service Manager 1 FTE  
Senior Officers 2.56 FTE  
Officers 8.4 FTE  
Translators  
Family Hub Structure

**VIRTUAL SCHOOL**

Senior Officer 1 FTE  
Officers 3.34 FTE

**SEND**

Service Manager 1 FTE  
Team Manager 1 FTE  
Senior Officers 5 FTE  
Officers 18.45 FTE  
STA Lead 0.8 FTE  
STAs 5.8 FTE

## **Rationale for redesign and proposed delivery of services:**

### Rationale:

The driver for an Education Service redesign is the need to better organise services and skillsets to address the three main priorities for Education in Southampton. These are:

- Increasing attendance
- Reducing exclusion
- Improving outcomes

At present, the Education Service promotes silo working with little opportunity for need-led deployment of resource. Management structures across the services lack parity or appropriate hierarchy to separate operational and strategic work. SEND has existed outside of the main Education Service for several years, a decision that has caused significant challenge from external stakeholders such as education providers. External stakeholder value in the services provided by Southampton City Council varies too widely between services and individual officers, and there is low resilience built into the current structure.

Under the proposed redesign, there would be significant change to several key services, as well as general management structure changes, to better align the service to its main priorities and ensure effective service delivery.

### Education Access & Integration

The primary purpose of Education Access & Integration can be summarised as:

- Ensuring a sufficiency of education options from compulsory school age to Post-16
- Ensuring inclusive access to appropriate education options, including EHE
- Ensuring barriers to education access are effectively addressed, whether this manifests as attendance, exclusion or need for alternative pathways
- Ensuring appropriate commissioning of alternative provision (PRU and Hospital School)

The service would be divided into a locality-led model, rather than an 'issue'-led model, allowing for holistic work with families and schools that encourages strong working relationships and collaborative, contextually aware, solution-orientated problem solving.

### Education Standards

The primary purpose of the Education Standards service can be summarised as:

- Ensuring high quality education provision across the city
- Ensuring a rich cultural offer for children and young people through musical opportunities and experience.
- Providing guidance and quality assurance of external alternative provision
- Providing overall responsibility for the delivery of moderation across the city

The Education Standards service has been designed to group a majority of services provided by teachers to ensure appropriate high-quality oversight and management.

### Early Years & Family Hubs

The primary purpose of Early Years & Family Hubs can be summarised as:

- Ensuring sufficiency of Early Years placements
- Ensuring majority uptake of Early Years placements, especially amongst the most vulnerable
- Ensuring quality of Early Years provision
- Ensuring appropriate support to families to reduce risks for children
- Ensuring appropriate support and enfranchisement for families for whom English is an additional language

## Appendix B – School Attendance Support Case Studies

### Child A – secondary phase

- **Involvement Start Date and Primary Reason:** The involvement with Child A began on 23/02/2024, primarily due to attendance issues. Point of referral 31%. Current attendance is now 92.22% with no absence from school for 7 weeks.
- **Subject Information:** Child A is registered at a Secondary School in year 9.
- **Challenges in Engagement:** Engaging with Child A's mother proves challenging due to her reluctance to attend meetings and inconsistent communication.
- **Communication Logs:** Various communications between education welfare officers and Child A's family detail attempts to arrange meetings and address attendance issues.
- **Home Visit and Meeting Arrangements:** Efforts were made to conduct home visits and arrange meetings, often hindered by family circumstances such as the presence of Child A's brother who had additional needs.
- **Family Dynamics:** Child A's family dynamics, including her parents' separation and her brother, impact her attendance and well-being.
- **School and Home Issues:** Issues at home, such as poor living conditions and financial difficulties, as well as Child A's reluctance to attend school, are recurring themes.
- **Parental Concerns and Actions:** Both parents express concerns about Child A's well-being and attendance, leading to various actions such as involving tutors and setting up meetings with school officials.
- **Support and Interventions:** Interventions include arranging attendance-focused meetings, providing parenting support, and exploring respite care for the brother.
- **Attendance-Focused Meetings:** Initial Attendance Focused Meetings (AFM) were arranged to address Child A's attendance issues. These meetings involved both parents and school.
- **Home Visits:** Home visits were conducted to discuss actions from previous meetings and to provide support directly to the family.
- **Parenting Support:** One-on-one parenting support sessions were arranged for Child A's mother, to help her manage Child A's attendance and behaviour.
- **School Interventions:** Various school-based interventions were implemented, such as changing Child A's seating in science class, allowing her to wear ear buds in class, and providing access to the breakfast club and the Wellbeing hub.
- **Respite Care:** The possibility of respite care for Child A's brother, was explored to alleviate some of the family's stress.
- **Communication and Honesty:** Emphasis was placed on honest communication between parents and the school regarding the reasons for Child A's absences.
- **Summer Activities:** Plans were made for Child A to participate in summer activities, such as cycling to school and practicing bus routes with her brother.
- These interventions were designed to provide comprehensive support to Child A and her family, addressing both educational and personal challenges.

- **Professional Meetings and Updates:** Regular professional meetings are held to discuss Child A's situation, involving school staff and education welfare officers, to coordinate support efforts. The FEW has been consistent in offering parenting support, financial budgeting support and emotional support to the family.

### Child B - Secondary phase

- **Involvement Initiation:** The involvement with the family of Child B began on March 16, 2023, due to concerns about school attendance. Point of referral 73%
- **Subject Information:** Child B is registered in Year 10 at a Southampton Secondary School.
- **Family and School Interactions:** Numerous communications between school representatives, the family, and medical professionals were documented, addressing various concerns and actions taken. For instance, there were discussions about the family's shop and how the children would sometimes accompany their parents to work. This was discussed with the Child Employment officer.
- **Medical Concerns:** Frequent medical issues were reported by the family, leading to consultations with healthcare providers to verify the legitimacy of these claims. The school and education welfare officers were concerned about the number of illnesses reported and the amount of time spent at the GP surgery. There were also concerns about Child B's appearance, including her looking unhappy, lack of motivation, and potentially being underweight. Attendance information shared with GP – the GP invited parent and Child B to a consultation. Confirmed to parent/Child B and professional network that her medical/illness would not prevent her from attending school on a regular basis.
- **Parental Engagement:** The parents frequently did not attend scheduled meetings, which complicated the intervention efforts. For example, the mother attended only two of the Fast Track meetings, while the father did not attend any.
- **Child's Perspective:** Child B appeared withdrawn and unhappy during interactions, raising concerns about her emotional well-being and the need for additional support. During a conversation with an education welfare officer, Child B rated her happiness at school as 7 out of 10 and at home as 8 out of 10. However, she was not forthcoming with information and seemed quiet and withdrawn.
- **Attendance Improvement:** By November 1, 2024, Child B's attendance had significantly improved to 100%, which was acknowledged as a significant improvement from the initial 73% at the point on SASS involvement.
- **Legal Considerations:** Due to prior attendance issues, legal proceedings were considered but were reconsidered after the notable improvement in attendance. The decision to close the case was discussed, and it was noted that no court papers had been submitted at that point and so it would be possible to do so.



- **Reward and Acknowledgment:** The significant improvement in attendance was outlined to the parents, and there were discussions about the school acknowledging and offering a reward to Child B.
- **Continued Monitoring:** The expectations of continued improvement were outlined, and it was emphasised that the improvement must be sustained for the service to withdraw.
- **Case Closure:** Once all actions were completed, the case was agreed to be closed and handed back to the school to support and review.

### **Child C – Year 5 Primary School pupil**

- **Initial Involvement and Attendance Issues:** Child C's case began on February 15, 2023, due to concerns about his school attendance, which was initially at 66% and later dropped to 39% before improving to 93.75%.
- **Support and Communication:** Various professionals, including the School Attendance Support Service (SASS), social workers, and school staff, communicated frequently through emails, phone calls, and text messages to support Child C and his family.
- **Challenges and Strategies:** Child C faced challenges due to his autism, including fixation on routines and anxiety about school. Professionals suggested strategies like visual timetables, reward charts, and consistent routines to help Child C.
- **Parental Involvement:** Child C's mother was actively involved in the process, communicating with professionals, attending meetings, and implementing suggested strategies to improve Child C's attendance and well-being.
- **Professional Meetings and Reviews:** Regular meetings and reviews, including core group meetings and RCPCs, were held to discuss Child C's progress and plan further support. These meetings often involved multiple professionals and focused on various aspects of Child C's life.
- **School's Role:** Primary School played a significant role in supporting Child C, providing additional learning support, catch-up sessions, and maintaining regular communication with other professionals involved in Child C's case.
- **Health and Well-being:** Child C's health and well-being were also addressed, with referrals to CAMHS and other health services to manage his anxiety and other related issues. Professionals emphasised the importance of a healthy sleep routine and consistent attendance.
- **Positive Outcomes:** By October 2024, significant improvements were noted in Child C's attendance and overall well-being, leading to the closure of the case with SASS. Child C's mother expressed gratitude for the support received.

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**SUBJECT:** Explanatory Note on the Matter of School Admissions Line in Central Services Block (Matter Arising)

**DATE:** 21<sup>st</sup> January 2025

**RECIPIENT:** Schools Forum

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**SUMMARY:**

1. This paper has been written in response to a Request for Review of Delegated School Budget Allocations for Admission Services by a Schools Forum delegate.

It should be read in conjunction with the papers further detailing the use of the Central Schools Service Block (CSSB) and the planned modification of this in line with the proposed Education Services redesign.

2. The request for review has asked to consider the following points:
  - i. Ensure that schools purchasing their own admission services are not unduly disadvantaged.
  - ii. Evaluate whether the funds retained for admission services are being used effectively and transparently.
  - iii. Consider mechanisms to reimburse or reduce the financial contributions of schools that do not rely on centrally provided services.
3. Apologies must be tendered for this length of this paper, however a comprehensive response has been felt the most appropriate to meet Schools Forum's request for more detailed oversight.

A brief overview of the key points in this presentation will be given at the Schools Forum meeting, with an opportunity for questions.

**BACKGROUND:**

4. As per the regulations issued by the Department for Education (DfE), the budget for School Admissions must be established and approved on its own budget line by Schools Forum, rather than as a contributory commitment or as a merged element of a contribution to committed responsibilities that local authorities hold for all schools; to maintained schools; or de-delegated services from the Schools Block.
5. 'Operation of the system of admissions and appeals' remains a duty that the Local Authority holds for all schools (Schedule 2, Paragraph 9); as does 'writing to parents of year 9 pupils about schools with an atypical age of admission, such as university technical colleges (UTCs) and studio schools, within a reasonable travelling distance' (Schedule 2, Paragraph 23).

6. A number of the services that are covered by funding that is held centrally are subject to a limitation of no new commitments or increases in expenditure from 2024 to 2025. This limit does not apply to School Admissions or the servicing of Schools Forum.
7. As per the DfE conditions: 'Where local authorities hold these duties in relation to all schools, all schools must be treated on an equivalent basis. Local authorities should not treat voluntary aided schools, foundation schools or academies differently from other maintained schools in the services they provide to them. This is set out in the DSG conditions of grant.'

This does not include funding that has been retained centrally from maintained school budgets only, where some statutory duties relate to community and voluntary controlled schools only.

However, in these situations, local authorities should not charge voluntary aided and foundation schools if requested to provide services to these schools and where there is no charge to community and voluntary controlled schools for the same service.'

8. In previous guidance, the DfE have stated: 'Where local authorities hold these duties in relation to all schools, all schools must be treated on an equivalent basis. Local authorities should not treat voluntary aided schools, foundation schools or academies differently from other maintained schools in the services they provide to them. This is set out in the DSG conditions of grant.'

For example, although admissions appeals are not a duty that the local authority holds in relation to all schools, the department would still expect all schools to be treated fairly and equitably by the local authority.'

While this set out clear expectation of the responsibility for School Admissions and appeals that should be held centrally for all schools, this expectation of central responsibility for School Admissions has been further stressed under the current government, as detailed in the Children's Wellbeing and Schools Bill.

The School Admissions budget line in the Central Schools Services Block is not retained centrally from maintained school budgets only, but from all schools. As such, services are provided to all schools and academies.

9. Southampton Schools Forum has maintained the School Admissions budget at 0.422M since at least 2012, where the earliest minutes still available confirmed this as the agreed amount.

Within this figure is 0.055M that is transferred to Southampton City Council Democratic Services for the administration of independent appeals (further details are provided later in this paper).

## **ADMISSIONS REGULATIONS:**

10. The Local Authority retains, by legal requirement, overall responsibility for the coordination of 'mainround' admission, including the processing of applications, making of offers and processing of late applications.
11. As per the Admissions Code, 2021: 'Local authorities are not required to coordinate in-year applications for schools for which they are not the admission authority. They may, however, coordinate in-year applications for any or all own admission authority schools in their area, with the agreement of the relevant admission authorities.'
12. Local authorities must, on request, provide information to prospective parents about the places still available in all schools within their area. To enable them to do this, the admission authorities for all schools in the area must provide the local authority with details of the number of places available at their schools whenever this information is requested, to assist a parent seeking a school place.
13. The Local Authority retains, by legal requirement, the duty to ensure a Fair Access Protocol is in operation. Once this is developed and agreed by a majority of admission authorities, all admission authorities within the Local Authority area are legally required to participate within this.
14. Parents, and in some circumstances children, have the right to appeal against an admission authority's decision to refuse admission. Under section 94 of the School Standards and Framework Act 1998, responsibility for making arrangements for appeals against the refusal of a school place rests with the admission authority of the school. The admission authority and appeal panel must act in accordance with this Code, the School Admissions (Appeal Arrangements) (England) Regulations 2012, the School Admissions Code, other law relating to admissions and relevant human rights and equalities legislation, for example, the Equality Act 2010.

Appeal panels perform a judicial function and must be transparent, accessible, independent, impartial, and operate according to principles of natural justice.

Two or more admission authorities in the same local authority area may make joint arrangements for hearing appeals.
15. A local authority has the power to direct the governing body of a maintained school for which they are not the admission authority to admit a child in their area even when the school is full.
16. A local authority also has the power to direct the admission authority for any maintained school in England (other than a school for which they are the admission authority) to admit a child who is looked after by the local authority, even when the school is full.

17. Where a local authority considers that an Academy will best meet the needs of any child, it can ask the Academy to admit that child but has no power to direct it to do so. The local authority and the Academy will usually come to an agreement, but if the Academy refuses to admit the child, the local authority can ask the Secretary of State to intervene. The Secretary of State has the power under an Academy's Funding Agreement to direct the Academy to admit a child and can seek advice from the Schools Adjudicator in reaching a decision.
18. Section 88P of the School Standards and Framework Act 1998 requires local authorities to make reports to the Schools Adjudicator about such matters connected with relevant school admissions as required by the Code. This includes an assessment of the effectiveness of Fair Access Protocols and co-ordination in their area, how admission arrangements affect the interests of looked after children and previously looked after children, and the number and percentage of lodged and upheld parental appeals.

#### **ADMINISTRATION OF SCHOOL ADMISSIONS IN SOUTHAMPTON**

19. It is acknowledged that individuals providing services in relation to school admissions within the Local Authority, schools and trusts may hold differing titles. For the purposes of clarity, throughout this report, the following terminology will be used:

**LA Admissions Officer** – an officer in Southampton City Council fulfilling the Local Authority School Admissions functions, as well as those functions delegated to the Local Authority by other admissions authorities.

**School Administrator** – an employee of a school who fulfils either school-held functions, or the School Admissions functions that are retained by schools and/or admissions authorities.

**Admissions Consultant** – a third-party officer who is delegated to fulfil the school-held School Admissions functions, and/or who is delegated to fulfil the admission authority functions.

20. Within the Southampton City Council boundary, there are 67 mainstream, state-funded schools that fall within this coordination.

The admission authorities for these 67 schools are as follows:

<b>School Type</b>	<b>Admission Authority</b>	<b>Quantity</b>
Academies	Academy Trust	32
Community Schools	Local Authority	5
Foundation Schools	Governing Body	23
Voluntary Aided Schools	Governing Body	4
Voluntary Controlled Schools	Local Authority	3

The 23 foundation schools are organised into 4 trusts.

The majority of the academies are organised into 6 academy trusts, which are a mix of national and local trusts. 4 academies exist as 'standalone' academies.

Of the voluntary aided schools, 3 are of a Roman Catholic denomination and 1 is Church of England.

The 3 voluntary controlled schools are all of Church of England denomination.

21. Of the 67 schools, 25 (37%) make use of Admissions Consultants.

### **ADMINISTRATION OF SCHOOL ADMISSIONS IN SOUTHAMPTON: MAINROUND ADMISSION**

22. As per the legal requirement, Southampton City Council coordinates the mainround admission scheme for admission into normal points of entry. In Southampton, this is:

- Year R, for infant and primary schools.
- Year 3, for junior schools.
- Year 7, for secondary schools.
- Years R and 7, for all-through schools.

23. Prior to the opening of the application window, the Local Authority fulfils the following functions:

- Drafting, reviewing, updating and consulting on admissions policies for all schools who delegate this responsibility. Distributing consultations for all schools, inclusive of those who do not delegate this responsibility.
- Collating all admissions policies for schools within the Southampton City Council boundary into a 'composite prospectus'. This is delivered via dedicated web pages on the Southampton City Council website, but can be provided in print on request. This is a legal requirement.
- Creating the transfer group in the central admissions system, populating this with all known Southampton City Council resident pupils in the relevant year group, liaising with Early Years providers and Health services for the population of the Year R transfer group. This pre-population helps to safeguard against any pupils not being offered a school place should their parent or guardian not make an application for them, and ensures pupils are appropriately tracked.
- Creating an appropriate common application form (CAF) for parents to access that is linked to the central admissions system. This is a legal requirement.

- Creating an appropriate late common application form for parents to access. This is not linked to the central admissions system. This is a legal requirement.
- Working with Early Years settings, primary and secondary schools, alongside work with community groups and the Local Authority Communications Service, to ensure families are able to access and understand the admissions process and make timely, informed applications. This includes:
  - Information sessions at primary schools for Year 6 parents, as well as support in the making of applications
  - LA Admissions Officer support at secondary school open evening/morning events
  - Information sessions for Early Years providers
  - Information sessions at community and faith centres
  - Training to Gateway and other customer-facing services on the process of admissions and application completion
- Previously LA Admissions Officers have written to all parents, making use of print room services, to inform them of the application window opening. In the last year, due to cost pressures, this has been amended to distribution of electronic communications through schools, Early Years settings and social media, with letters manually generated and posted by LA Admissions Officers to those pupils not in an education provision.
- Programming the central admissions system with the appropriate school bases, and programming the relevant admissions criteria for each school.

24. A key aspect of the mainround admissions process is the function of 'matching and validation'. This ensures that applicants are appropriately matched to existing pupil records to ensure appropriate recognition of known information that could have a bearing on the ranking of any application against admissions criteria; as well as verifying information provided on a pupil's application to ensure admissions criteria is correctly applied. The result of the matching and validation process is that correct ranked lists of applicants can be compiled from which offers will be made.

25. While matching and validation is the legal responsibility of the admission authority for a school, LA Admissions Officers fulfil the following steps of this process for all schools, beyond those for which they are the admission authority:

- Matching pupils to existing records to prevent duplication of offers and to ensure appropriate feeder school links can be established
- Using the GIS mapping system to run distance calculations for each school, according to the distance measurement given in their admissions policies
- Checking for siblings on roll at applied-for schools when this is indicated
- Checking Looked After, or Previously Looked After status for pupils where this is indicated and applying this where it is not indicated but is known to the Local Authority
- Checking Child Protection status for pupils where this is indicated



- Providing discretionary application of vulnerable status where this is appropriately evidenced and forms part of the relevant school(s)'s admissions criteria
- In liaison with the SCC SEND Service, ensuring those pupils with EHCPs that will name the school by the National Offer Day are appropriately included in the relevant school's offer number and ensuring any further plans naming the school above number after the National Offer Day are noted and that offers are not made under the relevant school is 'managed back down' under its Published Admission Number (PAN)
- Providing secondary address checks through the Council Tax system, where initial attempts to confirm an address have yielded unsatisfactory results
- Undertaking resolution work where there is disagreement over preferences between parties with parental responsibility (PR) for a pupil

26. As the admission authority for community and voluntary controlled schools, LA Admissions Officers complete the full matching, validation and ranking process for all such schools. They further complete this task for other admission authority schools, such as foundation trust and academy schools, where delegated to do so by that admission authority.

This process includes the steps noted in section 25, but further includes:

- Seeking and reviewing evidence provided and applying any medical/social criteria that applies for relevant school(s) where it is felt the test for this is met
- Seeking and reviewing Supplementary Information Form (SIF) or other religious evidence and applying any denominational criteria that applies for relevant school(s) where the test for this is met
- Confirming staff employment where an applicant is applying under any 'children of staff' criteria
- Seeking and reviewing evidence provided where an applicant is applying under any 'Service Family' criteria
- Seeking evidence of previous or current care status from other Local Authorities where it is suggested an applicant may be a Previously Looked After, or Looked After Child
- Undertaking address checks on the Council Tax system where there are concerns about an address used on an application

Admission authorities who do not delegate these responsibilities to the Local Authority must conduct these steps themselves, either through a School Administrator or Admissions Consultant.

While it is not a rule without exception, generally speaking schools with a religious character who retain this responsibility deliver this function through a School Administrator, Senior Leadership and/or delegates from their Governing Body; while Academy schools deliver this through the use of an Admissions Consultant.

27. For the schools where Southampton City Council are the admissions authority, as well as those who delegate responsibility for the matching, validation and ranking of applicants to Southampton City Council, validation and ranking is completed directly into the central admissions system.

Some schools who make use of an Admissions Consultant or School Administrator for their validation and ranking input this directly into the central admissions system (with the exception of Looked After or Previously Looked After Children and EHCP allocations, which LA Admissions Officers will manually input), while others return this as a ranked list via secure transfer and it is inputted manually by LA Admissions Officers.

28. The breakdown of matching, validation and input of rankings for the 67 mainstream schools within the Local Authority boundary is detailed below:

Number of schools for whom the functions in Point 26 are fulfilled by LA Admissions Officers:	67 100%
Number of schools for whom the functions in Point 27 are fulfilled by LA Admissions Officers:	38 57%
Number of schools for whom the functions in Point 27 are fulfilled by School Administrators and/or Admissions Consultants:	29 43%
Number of schools where rankings are made into the central admissions system by LA Admissions Officers:	38 57%
Number of schools whose School Administrators and/or Admissions Consultants directly input rankings to the central admissions system:	23 34%
Number of schools whose rankings are completed by School Administrators and/or Admissions Consultants but input into the central admissions system manually by LA Admissions Officers:	7 10%

29. The Local Authority will exchange information with other Local Authorities where Southampton City Council residents have applied for schools outside of its boundary, or vice versa.

30. Following the inputting of rankings, the Local Authority will complete the following actions:

- Running the initial offer process. This is an automated process.
- Manually checking and correcting any anomalies following the automated process. This is a manual process.
- Identifying those applicants who have not secured a school offer due to oversubscription of preference schools. This is a manual process.
- Identifying the appropriate alternative school offer for those who have not secured a preference offer. This is a manual process.
- Creating mail merges to generate offer letters for those families who have opted for letter notification. This is a manual process.
- Initiating the portal updates and emails to be delivered on National Offer Day. This is an automated process.

- Printing and mailing offer letters for those families who have opted for letter notification. This is a manual process.
- Completing the DfE Data return on the outcome of the mainround admissions process. This is a mix of automated and manual processes.
- Completing the data return for how schools oversubscribed, and the percentages of met preferences. This is a manual process.

31. Following National Offer Day, all refusals and acceptances of on-time offers, and processes for late applicants, are completed manually by the Local Authority. Details are sent to those schools who complete their own rankings to ensure waiting lists are accurate and up to date to facilitate this process.

The process of mainround admissions, including offers to late applicants and offers from waiting lists following declines of places offers, is administered by the Local Authority until the start of the relevant academic year.

### **ADMINISTRATION OF SCHOOL ADMISSIONS IN SOUTHAMPTON: IN-YEAR ADMISSIONS**

32. Southampton City Council maintains a position where it offers a level of coordination for in-year admissions for all schools, and full coordination for many more than those for which it is the admission authority.

This position is held both to support schools and support families. It ensures the admissions process, which is often confusing to families, is offered as simply as possible to applicants; that the responsibility for tracking and safeguarding unplaced pupils is retained by the Local Authority and not schools; and that high costs of individual systems for processing applications are not incurred by schools, including those who make use of an Admissions Consultant.

33. The Local Authority fulfils the following functions for all schools, through LA Admissions Officers, regardless of admission authority or use of Admissions Consultant:

- Providing a Common Application Form (CAF) that incorporates all admissions policy questions where relevant, without asking for information when it is not relevant to the selected school
- Providing a central admission system for use of all admission authorities and schools
- Matching incoming applicants to existing pupils to ensure appropriate transfer of information, application of relevant admissions criteria and oversight of movement for safeguarding purposes
- Running distance measurements for all applications and schools through the central GIS mapping system
- Applying the appropriate Previously Looked After, Looked After or Child Protection criteria to applications, where relevant
- Seeking and providing information to schools and Admissions Consultants that is relevant to safeguarding and challenging behaviour refusals

- Providing Admissions Consultants with details of preference order to minimise the risk of multiple offers or higher preference offers in quick succession to initial offers
- Providing Admissions Consultants with information when higher preference offers are made to ensure preferences are not needlessly processed
- Maintaining a central database of school PAN, number on roll (NOR) and vacancies, to inform families as needed and to minimise the risk of higher preference offers in quick succession to initial offers or delays to the processing of applications
- Identifying alternative offers where preference schools are unable to offer, to ensure unplaced pupils access school as quickly as possible
- Identifying cases that need to be considered under the Fair Access Protocol, whether due to reintegration to mainstream from PRU or custody, or due to the lack of a school place within a reasonable distance
- Tracking school data and allocations data for use of application of challenging behaviour refusals, appeal, allocation of Looked After or Previously Looked After pupils or application of the Fair Access Protocol
- Seeking and/or delivering legal advice, escalating challenge to advice where necessary, and holding the indemnity for actions taken on this

34. LA Admissions Officers perform the following function for all community and voluntary controlled schools, as well as other schools who delegate these functions to them, including those who may make use of an Admissions Consultant:

- Updating of offer status in the central admissions system
- Making offers of school places
- Issuing refusals of school places, and opening right to appeal

35. Some School Administrators may fulfil some or all of the functions listed in Point 34.

Where schools make use of an Admissions Consultant, they may fulfil some or all of the functions listed in Point 34.

In both cases, there is some level of 'doubling up' inherent in this process where this happens.

For example, if an applicant applies for two schools that include one community school and one academy who make use of an Admissions Consultant, and neither school can offer, the Admissions Consultant will issue a refusal letter that opens right of appeal, LA Admissions Officers will then identify and offer an alternative school place. As part of the offer, they will confirm the decline of an offer at both preference schools and open right of appeal. This means that the parent will have duplicate correspondence about the academy school.

36. LA Admissions Officers fulfil all functions in Point 34 where an allocation is made via the Fair Access Protocol.
37. When making in-year offers, LA Admissions Officers will liaise with School Administrators to ensure vacancy amounts are accurate and whether or not any challenging behaviour refusals will be issued before offering. Where a school employs an Admissions Consultant, the LA Admissions Officers will liaise with the Admissions Consultant, who will liaise with School Administrators.
38. Challenging behaviour refusals, also known as '3.10 refusals' are completed by School Administrators, or other staff, or Admissions Consultants where a school makes use of these.
39. Admissions Consultants have licence agreements to access the central admission system that they are invoiced for. This cost will be included in the rates for services tendered to schools.
40. The breakdown of in-year admissions services tendered for each of the 67 mainstream schools is given below:

Number of schools for whom the functions listed in Point 33 are fulfilled by LA Admissions Officers:	67 100%
Number of schools for whom updating of offer status in the central admissions system is completed by LA Admissions Officers:	42 63%
Number of schools for whom updating of offer status in the central admissions system is completed by School Administrators or Admissions Consultants:	25 37%
Number of schools for whom offer and refusal letters, and right of appeal, are issued exclusively by LA Admissions Officers:	34 51%
Number of schools for whom offer and refusal letters, and right of appeal, are issued by School Administrators or Admissions Consultants (as well as by LA Admissions Officers when covered as a result of other processes as given in the example in Point 35):	32 49%
Number of schools for whom offer and refusal letters, and right of appeal are issued by LA Admissions Officers following use of the Fair Access Protocol:	67 100%

#### **ADMINISTRATION OF SCHOOL ADMISSIONS IN SOUTHAMPTON: INDEPENDENT APPEALS**

41. Southampton City Council administers the independent appeal function for all schools and academies, beyond those for which they are the admission authority, through its Democratic Services department. This includes the following functions:
- Organising appeals within the legal timeframe
  - Providing appropriate spaces for appeals to be heard
  - Providing appropriately trained Clerks

- Organising an appropriately trained appeal panel that meets the legal requirements
- Seeking and providing legal advice when necessary
- Providing training for Clerks
- Providing training for appeal panellists
- Providing training for presenting officers, whether this be SCC Admissions Officers or Admissions Consultants

42. LA Admissions Officers will serve as the Presenting Officer for appeals, who present the response to parental appeals, for community and voluntary controlled schools by default, but also provides this service to other admission authority schools where this is delegated to them.

Some schools who make use of an Admissions Consultant will have the Admissions Consultant serve as their Presenting Officer.

43. The Presenting Officer is responsible for preparing the written submission for response to appeal and presenting this at the appeal hearing.

The Presenting Officer should always be a person with an expertise in Admissions and Appeals to answer the technical questions for this process. It is advised that a school representative also attends to provide any detail as to the specific contexts of the school that may be asked of during the hearing, however Presenting Officers will speak to this as much as possible in the absence of a school representative.

Schools often send a Headteacher, member of Senior Leadership, member of staff with responsibility for admissions or a Governor as the school representative.

44. While the duty to prepare and present the case falls to the Presenting Officer, in liaison with the school for relevant school data; where this is an Admissions Consultant, LA Admissions Officers prepare and provide documentation and information to aid with this process.

45. Some schools who make use of an Admissions Consultant for other aspects of their process continue to use LA Admissions Officers as their Presenting Officer, and vice versa.

46. The breakdown of appeals services tendered for each of the 67 mainstream schools is given below:

Number of schools for whom the administration of appeals is provided by the LA Democratic Services Team:	67 100%
Number of schools for whom essential appeal information is provided by LA Admissions Officers:	67 100%
Number of schools for whom LA Admissions Officers serve as Presenting Officers:	42 63%

Number of schools for whom Admissions Consultants serve as Presenting Officers:	25 37%
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## SCHOOL ADMISSIONS BUDGET

47. In the request for the review of the School Admissions budget line within the Central School Services Block, it is stated that 'I have been made aware that over 50% of schools within Southampton have opted to procure their own admission services'.

This position is inaccurate, as no school within Southampton operates its own full admission service, as part of mainround or in-year admission. Nor do over 50% employ an Admissions Consultant and/or deliver the majority of their admission services outside of Local Authority coordination and/or delivery.

48. As detailed in the background information at the top of this paper, School Admissions remains a function that must be funded as its own line in the Central School Services Block, and is not subject to a limit of previous spend in its determination by Schools Forum.

49. The earliest available minutes of Schools Forum state a continued agreement of the School Admissions budget line in the Central School Services Block at 0.422M. While this has been reviewed in subsequent years, there has not been a change to the funding amount since this time.

50. LA Admissions Officers provide services to all schools beyond the legal requirements, beyond those who whom the Local Authority is the admissions authority, and inclusive of those schools who make use of an Admissions Consultant.

51. The Local Authority coordinates mainround admissions as per legal requirement, and provides a system of coordination for all schools for in-year admissions.

Where schools retain a desire to complete their own ranking, which may be preferred especially by schools of faith denomination, this can be performed directly by school staff such as School Administrators or Governors, or through use of an Admissions Consultant. It is a requirement that no one person completes such ranking on behalf of the admissions authority.

Where schools retain a desire to issue their own offers and/or refusals, including opening right to appeal, this can be performed directly by school staff such as School Administrators, or through use of an Admissions Consultant. The 'doubling up' of offer and/or refusal, including opening right to appeal, with LA Admissions Officer work is inherent to this process.

LA Admissions Officers complete these tasks for all schools where there has been a need for application of the Fair Access Protocol.

52. The Local Authority administers the independent appeals process for all schools through its Democratic Services department. Inclusive in this offer is training for Admissions Consultants who serve as Presenting Officers.

LA Admissions Officers further provide appeal services for all schools, inclusive of those who make use of Admissions Consultants as Presenting Officers.

Admissions authorities are able to make use of LA Admissions Officers or Admissions Consultants as Presenting Officers and provide school staff to assist at hearings.

53. Since 2012, the demand on the admissions system, especially for in-year admission and appeals, has increased. Snapshot data points are provided below:

	<b>2012 Intake 2012/13 In-Year*</b>	<b>2015 Intake 2014/15 In-Year</b>	<b>2019 Intake 2018/19 In-Year</b>	<b>2022 Intake 2021/22 In-Year</b>	<b>2024 Intake 2023/24 In-Year</b>
<b>Mainround applications (Inf/Pri)</b>	3,834	4,179	3,649	3,316	3,192
<b>Mainround applications (Jun)</b>	1,384	815	888	874	860
<b>Mainround applications (Sec)</b>	2,425	2,764	3,946	4,023	3,436
<b>In-year applications</b>	936	3,198	3,457	4,290	5,285
<b>Appeals lodged</b>	Not held	140	157	174	353

\*2012/13 In-Year provided rather than 2011/12 In-Year admission was subject to previous admissions legislation at this time and was no coordinated in the same way by the Local Authority.

There have been 274 appeals lodged in-year for the 2024/25 academic year thus far, before any mainround appeals for 2025 entry are heard or further in-year appeals made.

54. Application of the Fair Access Protocol has increased in recent years. This is due to a mixture of factors including a significant deficit of placement in the secondary phase; emergency response application of the Protocol such as in response to Operation Warm Welcome; and an increasing presentation of challenging behaviour.

The data snapshot of the number of placements via the Fair Access Protocol over recent years is provided below:



	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Primary Allocations</b>	1	0	0	1	3
<b>Secondary Allocations</b>	7	9	25	303	320

55. The services delivered by LA Admissions Officers for all schools are able to be delivered due to the principle of economies of scale that allow for the services for all schools to be absorbed into workstreams of officers alongside the services for schools where the Local Authority is the admissions authority or providing delegated services for another admissions authority.
56. All admissions functions are offered to all schools without additional charge as per the required commitment for funding for School Admissions to be delivered through the Central School Services Block and for the offer of services to non-Local Authority admission authority schools to be equitable.
57. Schools may choose to employ the services of an Admissions Consultant to deliver functions that may be otherwise held by School Administrators or delegated to the Local Authority and delivered through LA Admissions Officer.
58. Schools who employ Admissions Consultants still use the coordination of the Local Authority for mainround and in-year admissions, and have functions fulfilled by the Local Authority.

The function of the Admissions Consultant is to fulfil functions that may otherwise fall to a School Administrator or be delegated back to the Local Authority. In this way, the role of an Admissions Consultant is more comparable to roles that would be held and fulfilled by school staff, rather than LA Admissions Officers (save for Presenting Officer duties), and the engagement of an Admissions Consultant does not necessarily reduce the demand on the LA Admissions service.

An Admissions Consultant does not complete the full admissions functions for a school or admission authority, but works in tandem with school and the Local Authority. It may be useful for comprehension to view this as a 'middle man' arrangement for the majority of services tendered when it comes to mainround and in-year admissions, save for performing as a Presenting Officer.

59. The School Admissions budget line in the Central School Services Block has not increased in at least thirteen years, despite an increased demand to the service, a reduction in the funding provided to the Central School Services Block and general inflation.
60. School admission appeals have increased significantly in volume over the past several years, particularly for in-year admission appeals, which are less able to be pre-emptively planned for in work streams.

To meet this demand, the ask on Democratic Services has increased and additional members of staff have needed to be employed and trained as appeal clerks.

61. The transfer of 0.055M to Democratic Services for appeal functions has not increased, and so there has been a reliance on the use of Local Authority general funds to ensure delivery of services.

In an attempt to ensure cost efficiencies, Democratic Services have invested in a new IT programme called *Appeals Pro* to reduce the logistic and paperwork processing that has previously been completed manually by LA Admissions Officers, Admissions Consultants and LA Democratic Services Officers.

No additional charge is being made to Admissions Consultants for the use of this programme and access to it.

No additional charge has been added to the 0.055M transfer from the School Admissions budget line.

The cost of this programme has been provided through the Local Authority general fund.

62. The service provided by Democratic Services for the administration of the appeals process is currently underfunded by the 0.055M budget allocation, but as there is not available budget to increase this, the service is maintained at an additional cost to the Local Authority general fund.

While this is not in-keeping with the guidance for the Central Schools Services Block, an increased ask has not been made to Schools Forum to increase available funds for appeal services, in recognition of other cost pressures.

63. Appeal panellist expenses are not covered in the 0.055M transfer to Democratic Services, but are instead funded from the remaining School Admissions budget.

Savings have been made to expenses costs, but the volume of appeals means that this cost remains relatively high despite savings.

Removal of panellist expenses has been trialled in neighbouring Local Authorities, however this has reduced panellists willing to sit on panels in these areas and to ensure that panels can be provided, Southampton City Council are not proposing to remove the reimbursement of panellist expenses.

A concerted effort is being made to recruit additional local panellists, both to ensure that panel make-up best represents the local community, and to reduce travel expenses.

64. As a result of the factors above, and in light of pay awards for local government officers, based on the current organisation of the service, there would be a cost pressure for the Admissions Service at its current budget allowance starting in the 2025/26 financial year.

65. To avoid a budget pressure, or an ask of Schools Forum to increase the School Admissions budget line, the School Admissions service is one that has been carefully considered as part of the Education Services redesign.

Formalising existing links and crossover work between School Admissions and functions of the Children Not in School service, there is the proposal to create the Education Access team, where the function of School Admissions would sit, alongside responsibilities for Children Missing Education (CME), initial Elective Home Education (EHE) processing and checking, and part-time timetables (PTT).

66. This service redesign has presumed a continuation of the 0.422M budget line for the function of School Admissions.

Should this budget be reduced, the offer of services to all schools, both those who do and do not employ the services of an Admissions Consultant, would be dramatically reduced, to focus on meeting core statutory requirements.

67. While the exact details of reduction in service would need to be determined based on the budget reduction, below is a summary of the services most likely to be at risk following any budget reduction:

- Policy drafting, consultation and review for all but community and voluntary controlled schools.
- The administration of independent appeals, including the provision of training and delivery of appeal Clerks, panels and Presenting Officers. There would be a need for admission authorities to facilitate appeals through other services, at direct cost to these.
- Foundational coordination of the in-year admissions process, including access to a central admissions system. This would mean that schools would need to fund and administrate their own systems and hold responsibility for pupil tracking.
- Matching incoming applicants to existing pupils to ensure appropriate transfer of information, application of relevant admissions criteria and oversight of movement for safeguarding purposes. This would present a risk to safeguarding and would mean decisions are made without access to relevant contextual information.
- Running distance measurements for all applications and schools through the central GIS mapping system. This would require schools to fund their own appropriately vetted systems.
- Applying the appropriate Previously Looked After, Looked After or Child Protection criteria to applications, where relevant. This would mean that

appropriate ranking and processing of applications may not happen, at risk to the best interests of these pupils.

- Seeking and providing information to schools and Admissions Consultants that is relevant to safeguarding and challenging behaviour refusals. This would present a risk to safeguarding and would mean decisions are made without access to relevant contextual information.
- Providing Admissions Consultants with details of preference order to minimise the risk of multiple offers or higher preference offers in quick succession to initial offers. This would mean that pupils may have several school moves in quick succession or put schools at risk of being underpopulated at School Census.
- Providing Admissions Consultants with information when higher preference offers are made to ensure preferences are not needlessly processed. This would mean that pupils may have several school moves in quick succession or put schools at risk of being underpopulated at School Census, or mean that schools would be needlessly making offers to pupils who no longer require them.
- Maintaining a central database of school PAN, number on roll (NOR) and vacancies, to inform families as needed and to minimise the risk of higher preference offers in quick succession to initial offers or delays to the processing of applications. This would mean that pupils may have several school moves in quick succession or put schools at risk of being underpopulated at School Census, or mean that schools would be needlessly making offers to pupils who no longer require them.
- Mainround validation and ranking of applications for schools where the Local Authority are not the admission authority. This burden would fall to schools to meet.
- Providing appeal data for school census returns. This burden would fall to schools to meet.

68. As the continuation of School Admissions services have been linked with those of Children Not In School services in the Education Services redesign, to avoid an additional budget request of Schools Forum, any reduction to the School Admissions budget line would also see a reduction to Children Not In School services as there is a reliance of economies of scale in their delivery alongside School Admissions functions. This would result in an increased burden to schools for the tracking of pupils and reduced strategic support and guidance for Children Not in School services.

69. To address the reduction in scale of services provided by the Local Authority should the School Admissions budget be reduced, there would need to be an increase in services provided by School Administrators or Admissions Consultants, including the purchase of appropriate systems. Alongside the purchase of systems, schools, Trusts and Admissions Consultants would need to employ additional staff to meet the shortfall of service delivery.

Certain functions, such as the automatic access to relevant centrally-held information, would need to be removed entirely and there would be an

increased risk of mistakes in offers, missed opportunities for challenge to admission, and duplicate offers, or offers in rapid succession that sees multiple moves for pupils in short time periods. Schools would also hold an increased level of responsibility for the safeguarding and tracking of unplaced children as this oversight would no longer be held centrally.

It is likely that the cost to schools to provide these services would exceed the current percentage by school commitment that is committed to the School Admissions budget line.

70. It is also likely that appeal challenge to the Local Government and Social Care Ombudsman (LGSCO), process and offer challenge Secretary of State and/or Schools Adjudicator would increase, creating an additional cost pressure to schools and Trusts.
71. Admission authorities retain the right to issue their own in-year offer and refusals letters, despite that there may be a 'doubling up' of the work where other schools are applied to. This can be completed by School Administrators of Admissions Consultants, however the offer to all schools for this to be delegated to LA Admissions Officers is covered by the current budget allocation.
72. As per the legal requirement, the Local Authority School Admissions service provides the core mainround coordination for 100% of mainstream schools. It further provides delegated validation and ranking services for 57% of mainstream schools, completing manual input for a further 10% of schools.
73. Currently the Local Authority School Admissions service provides core in-year coordination and services for 100% of mainstream schools; provides direct system processing and updates for 63% of schools; and fulfils the offer, refusal and opening of right of appeal for 51% of schools in all cases, with additional provision for some schools who retain this function (due to the nature of this process) and for 100% of schools where the Fair Access Protocol is applied.
74. Currently the Local Authority Democratic Services department provides the administration of independent appeals, including training for third party Admissions Consultants for 100% of mainstream schools.

Local Authority Admissions Officers further provide appropriate information and documentation for 100% of mainstream schools, and serve as Presenting Officer for 63% of mainstream schools.

75. As referenced in Point 55, current services to schools can be offered due to economies of scale for provision delivered to schools who delegate responsibility of functions to the Local Authority.

The services listed in Point 34, which are delivered by LA Admissions Officers to between 51% and 100% of schools in varying degrees, are made available to

all schools by credit of LA Admissions Officers delivering the services in Point 34 and absorbing the functions listed in Point 34 into these work streams.

76. Delivery of the functions listed in Point 33 also allow for an appropriate level of staffing to allow for full mainround and in-year delegated validation and ranking to be undertaken by LA Admissions Officers, which is delivered to 57% of schools, with a further 10% of schools being provided with manual input of rankings by LA Admissions Officers. Further validation and ranking for specific purposes, as outlined in Points 25 and 33, are provided to 100% of schools.

## CONCLUSIONS

77. Below follows a response to the three points noted in the request for review of the School Admissions budget line in light of the information provided in this paper.

78. In response to the point: **Ensure that schools purchasing their own admission services are not unduly disadvantaged.**

It is the opinion of the Local Authority that schools who purchase additional admissions services through the use of an Admissions Consultant are not unduly disadvantaged.

The Local Authority School Admissions Service, as funded through the Central School Services Block (CSSB) budget in the Designated Schools Grant (DSG), provides the statutory mainround and in-year admission mechanisms. It further provides additional mainround and in-year services that all schools access, regardless of admission authority, school designation or whether schools make use of an Admissions Consultant.

The work undertaken by Admissions Consultants or School Administrators is able to be delivered in the format it currently is, where schools use these roles for admissions purposes, due to the underpinning of the system provided by the Local Authority admissions service.

No school is required to use School Administrators or Admissions Consultants to deliver any part of their admissions process, however may choose to do so if this is the desire of the Headteacher and/or trust management.

Currently within Southampton, no school provides its own full admissions service and the workstreams of Admissions Consultants work in tandem with the Local Authority, rather than in isolation.

The Local Authority have no objection to schools and/or trusts making use of Admissions Consultants and have the highest respect for the professional skills of those Admissions Consultants currently working in Southampton. Such Admissions Consultants are invited to share in training opportunities with and work alongside LA Admissions Officers.

If there were to be a reduction to the School Admissions budget, then there would be a decline in the services offered to all schools, including schools that currently make use of Admissions Consultants or School Administrators. This would mean that fees charged by Admissions Consultants would increase to meet increased service demands and/or additional School Administrators would need to be employed; and some services provided by the Local Authority would not be able to be completed by School Administrators or Admissions Consultants, so would be removed altogether.

All schools make use of Local Authority admissions services, and have the option to delegate full delivery to the Local Authority without additional charge, should they chose to do so, by credit of how the wholesale offer has been arranged.

The decision to make use of Admissions Consultants may be considered a 'paying twice' charge, however as use of the Local Authority Admissions Service is still being provided, it is not undue disadvantage and remains a preference decision for schools and/or trusts.

As the School Admissions service, and the appeals service as delivered by Democratic Services, are currently underfunded for the services provided, and schools would have to absorb significant additional costs should these services be reduced or removed, no disadvantage in the current funding model is perceived.

79. In response to the point: **Evaluate whether the funds retained for admission services are being used effectively and transparently.**

As detailed in this paper, the budget for School Admissions has remained consistent for at least 13 years, despite an increase in the demands on the service, including appeal services; an increase in the services offered, including the transfer of the responsibility for School Place Planning; reductions to Central School Services Block funding; and general inflation and cost increases.

To ensure efficiencies in the administration of admissions appeals, new IT applications have been purchased outside of the DSG funding for this.

The current cost of the School Admissions service (exclusive of the cost of software licensing, expenses for appeal panellists and officers, and giving the funding for the administrations of appeals at 0.055M, which is an underfunded amount) is 0.456M.

The service is currently underfunded for what is delivered, with some costs absorbed by the Local Authority general fund and with forecasted cost pressures that the service would not be able to resolve in its current structure.

To address the cost pressures without an additional ask on the DSG, School Admissions has been carefully considered as part of the proposed Education Services redesign, to allow for more cohesive work within Local Authority teams and to provide appropriate financial and logistical efficiency.

The proposed allocation of the School Admissions CSSB budget line to the Education Services design is as follows:

- 0.055M transfer to Democratic Services for the administration of independent appeal panels
- 0.114M contribution to the provision of Senior Education Access Officer work (66% of total cost)
- 0.201M contribution to the provision of Education Access Officer work (75% of total cost)
- 0.051M contribution to the provision of Education Access management, inclusive of delivery of the Fair Access Protocol (Team Manager for Education Access, 63.1% of total cost)

We believe that the current use of the School Admissions budget, as well as the proposed application of this to the proposed Education Services redesign is transparent and efficiently managed, with greater efficiencies identified in the proposed redesign to avoid a request for increased funding levels.

80. In response to the point: **Consider mechanisms to reimburse or reduce the financial contributions of schools that do not rely on centrally provided services.**

The services delivered to all schools are currently underfunded by the agreed School Admissions budget.

While some schools may choose to make use of an Admissions Consultant rather than School Administrators or delegation to LA Admissions Officers, these schools still make use of Local Authority coordination and services. Admissions Consultants are unable to operate without the underpinning service delivered by the Local Authority. The delivery of these services rely on the economy of scales through wholesale uptake across Southampton.

If these core coordination and service provisions were to be removed through a reduction in the School Admissions budget, schools and/or trusts would incur significant costs to establish their own systems and services, which would be likely to outstrip the per school contribution to the School Admissions budget for these services through the CCSB. Some services would not be able to be provided outside of a Local Authority model and so would need to be foregone for all schools, as it would not be suitable to deliver to only community and voluntary controlled schools. There would be an increased risk of offers in error, challenge and multiple offers.



Considering the services provided to all schools, inclusive of those who retain some elements of the admissions process to be delivered by School Administrators and/or Admissions Consultants, for which the Local Authority is currently underfunded to provide, it is not felt appropriate that there be an arrangement for schools who do make use of School Administrators and/or Admissions Consultants for elements of the admissions process to be reimbursed or have a reduction in commitment to the School Admissions budget line in the CSSB.

The use of School Administrators and/or Admissions Consultants for elements of the admissions process remains at the discretion of the preference of individual schools/trusts but is not necessitated as such functions can be fulfilled alongside those for which LA Admissions Officers already provide to all schools, inclusive of such schools.

Currently, all mainstream schools within Southampton make use of centrally provided services, inclusive of those who employ the services of an Admissions Consultant.

81. It is hoped that the detail in this paper satisfies the request for review, however the Local Authority remains open to further question and the provision of additional information where this is available and appropriate.

<b>Further Information Available From:</b>	<b>Name:</b>	Zoe Snow
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2.13%

Appendix A: DSG 2025-26 Allocations

	2025-26 DSG (19/12/2024)			2025-26 Provisional DSG (28/11/2024)			Change (Pupil numbers) (C) = (A - B)			% Change	2024-25 DSG (19/11/2024)			Change (E) = (B - D)			% Change	Net Change (F) = (A - D)			% Change	
	(A)			(B)			(C) = (A - B)				(D)			(E) = (B - D)				(F) = (A - D)				
	Pupil Nos.	Unit Value £s	DSG funding £m	Pupil Nos.	Unit Value £s	DSG funding £m	Pupil Nos.	Unit Value £s	DSG funding £m		Pupil Nos.	Unit Value £s	DSG funding £m	Pupil Nos.	Unit Value £s	DSG funding £m		Pupil Nos.	Unit Value £s	DSG funding £m		
<b>Schools Block</b>	Primary Pupils (PUF)	19,142	5,610.14	107.39	19,347	5,610.14	108.54	-205	0.00	(1.15)	-1.1%	19,347	5,189.54	100.40	-	420.60	8.14	8.1%	-205	420.60	6.99	7.0%
	Secondary Pupils (SUF)	13,157	7,542.75	99.24	13,086	7,542.75	98.70	71	0.00	0.54	0.5%	13,086	6,957.74	91.05	-	585.01	7.66	8.4%	71	585.01	8.19	9.0%
	Growth			1.07			NA		-	NA				1.32				0.0%			(0.25)	-19.3%
	Premises factors			3.12			3.12		-	0.00	0.0%			3.05		0.07		2.2%			0.07	2.2%
	Additional grants													11.47		(11.47)		-100.0%			(11.47)	
	<b>Schools Block - Before recoupment</b>	32,299		210.82	32,433		210.36	-134		0.45	0.2%	32,433		207.30		4.39		2.1%	-134		3.52	1.7%
	Rates			(2.15)										(2.10)				0.0%			(0.05)	2.2%
Academy Recoupment													(85.71)				0.0%			85.71	-100.0%	
<b>Schools Block - After deduction</b>	32,299		208.67	32,433		210.36				0.0%	32,433		119.49		(11.41)		-9.5%	-134		89.18	74.6%	
<b>Central School Services Block</b>	Ongoing Responsibilities	32,299	48.08	1.55	32,433	48.08	1.56	-134	-	(0.01)	-0.4%	32,433	43.91	1.42		4.17	0.14	9.5%	-134	4.17	0.13	9.0%
	Historic Commitments			0.16			0.16			0.00	0.0%			0.21		(0.04)		-20.1%			(0.04)	-20.1%
	Additional grants													0.16		(0.16)		-100.0%			(0.16)	-100.0%
	<b>Total CSSB</b>	32,299		1.72	32,433		1.72	-134		(0.01)	-0.4%	32,433		1.79		(0.07)		-3.7%	-134		(0.07)	-4.0%
<b>High Needs Block</b>	National Funding Formula			46.29			46.29			0.00	0.0%			42.01		-	4.28			-	4.28	10.2%
	Basic Entitlement Factor (Sp Schs & Acads)	944.50	4,763.36	4.50	921	4,763.39	4.39	23.50	-0.03	0.11	2.6%	921	4,763	4.39		0.03	0.00	0.0%	24	-	0.11	2.6%
	Import / Export adjs			(0.74)			(0.73)			(0.01)	0.8%			(0.74)		-	0.01	-0.8%			0.00	0.0%
	Hospital education, alternative provision teachers pay/pension and supplementary funding factor (£s)			0.13			0.13			0.00	0.0%			0.13		-	0.00	0.0%			0.00	0.0%
	<b>High Needs Block - Before recoupment</b>			50.18			50.07			0.11	0.2%			45.79		4.28		9.3%			4.39	9.6%
	EFA Direct funding of places			(5.49)										(5.49)								0.00
<b>High Needs Block - After recoupment</b>			44.69			50.07							40.31		4.28		10.6%			4.39	10.9%	
<b>Early Years Block</b>		PTE	£/hour		PTE	£/hour		PTE	£/hour	0.00		PTE	£/hour		PTE	£/hour			PTE	£/hour		
	Under 2 Year Olds (Schs + PVI)	1,157.64	12.74	8.41								479.45	12.55	3.43					678.19	0.19	4.98	145.1%
	2 Year Old disadvantaged (Schs + PVI)	507.65	9.34	2.70								507.65	9.20	2.66						0.14	0.04	1.5%
	2 Year Old working parents (Schs + PVI)	1,062.80	9.34	5.66								684.82	9.20	3.59					377.98	0.14	2.07	57.6%
	3&4 Year Old (Schs + PVI)	3,150.39	6.62	11.89								3,150.39	6.48	11.64						0.14	0.25	2.2%
	3&4 Year Additional (Schs + PVI)	1,305.83	6.62	4.93								1,305.83	6.48	4.82						0.14	0.10	2.2%
	EYPPG - 3&4 Year Olds	765.90	1.00	0.44								765.90	0.68	0.30						0.32	0.14	47.1%
	EYPPG - 2 Year Olds	357.87	1.00	0.20								357.87	0.68	0.14						0.32	0.07	47.1%
	EYPPG - Under 2 Year Olds	32.21	1.00	0.02								26.76	0.68	0.01					5.45	0.32	0.01	77.0%
	MNS - 3&4 year olds	49.07	5.27	0.15								49.00	4.64	0.13					0.07	0.63	0.02	13.7%
	DAF - 3&4 Year Olds	205.00	1.65	0.19								193.00	1.60	0.18					12.00	0.05	0.02	9.5%
	DAF - 2 Year Olds	51.00	1.65	0.05								58.00	1.60	0.05					-7.00	0.05	(0.00)	-9.4%
	DAF - Under 2 Year Olds	15.00	1.65	0.01								16.00	1.60	0.01					-1.00	0.05	(0.00)	-3.4%
	<b>Total Early Years Block</b>	8,660.36		34.64				8,660				7,594.67		26.96			0.00	0.0%	1,066		7.68	28.5%
	<b>Total DSG</b>	Total DSG before Recoupment			297.36			262.16	-134		0.55	0.2%			281.84		8.60		3.1%			15.52
Total DSG after Recoupment				289.72			262.16			27.56	10.5%			188.55		(7.19)		-3.8%			101.18	53.7%

Note:  
\*The TPAG, TPECG and CSBG are being rolled into CSSB in 2024-25

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Appendix C : Change in NOR

Phase	Estb. No.	School	Oct 24 NOR Pri	Oct 24 NOR Sec	Oct 23 NOR Pri	Oct 23 NOR Sec	Primary Movement	Secondary Movement	Net
Primary	8522000	Bassett Green Primary School	444		477		-33		-33
Primary	8522001	Valentine Primary School	517		599		-82		-82
Primary	8522002	Thornhill Primary School	354		370		-16		-16
Primary	8522003	Newlands Primary School	407		408		-1		-1
Primary	8522004	Sinclair Primary and Nursery School - Part of the Learning Fed	204		211		-7		-7
Primary	8522005	Hollybrook Junior School	240		237		3		3
Primary	8522006	Hightown Primary School	196		177		19		19
Primary	8522007	Tanners Brook Primary School	396		407		-11		-11
Primary	8522008	Hope Community School Southampton	228		216		12		12
Primary	8522009	Weston Park Primary School	516		505		11		11
Primary	8522010	Weston Shore Infant School	68		75		-7		-7
Primary	8522011	St Monica Primary School	349		385		-36		-36
Primary	8522401	Mansel Park Primary & Nursery School - Part of the Learning f	308		325		-17		-17
Primary	8522404	Beechwood Junior School	359		355		4		4
Primary	8522405	Bevois Town Primary School	417		414		3		3
Primary	8522406	Bitterne Manor Primary School	209		210		-1		-1
Primary	8522407	Bitterne Park Primary School - Part of the Learning Federation	623		626		-3		-3
Primary	8522409	Mount Pleasant Juniors	352		341		11		11
Primary	8522410	Mount Pleasant Infants	225		208		17		17
Primary	8522418	Ludlow Junior School	578		573		5		5
Primary	8522419	Ludlow Infant Academy	261		270		-9		-9
Primary	8522421	Portswood Primary School	419		420		-1		-1
Primary	8522423	St Denys Primary School	212		210		2		2
Primary	8522424	St John's Primary and Nursery School	391		405		-14		-14
Primary	8522425	Shirley Junior School	360		359		1		1
Primary	8522426	Shirley Infant School	269		270		-1		-1
Primary	8522429	Sholing Junior School	348		357		-9		-9
Primary	8522430	Sholing Infant School	268		269		-1		-1
Primary	8522431	Swaythling Primary School	210		205		5		5
Primary	8522432	Woolston Infant School	174		173		1		1
Primary	8522437	Glenfield Infant School	263		269		-6		-6
Primary	8522440	Banister Primary School	417		416		1		1
Primary	8522441	Mansbridge Primary School	207		205		2		2
Primary	8522448	Redbridge Primary School	210		209		1		1
Primary	8522452	Wordsworth Primary and Nursery School	598		623		-25		-25
Primary	8522455	Moorlands Primary School	384		403		-19		-19
Primary	8522458	Hollybrook Infant School	171		179		-8		-8
Primary	8522460	Kanes Hill Primary School	382		376		6		6
Primary	8522461	Townhill Infant School	137		156		-19		-19
Primary	8522463	Townhill Junior School	258		264		-6		-6
Primary	8522471	Oakwood Primary School	412		418		-6		-6
Primary	8522754	Fairisle Infant and Nursery School	265		253		12		12
Primary	8522757	Fairisle Junior School	380		395		-15		-15
Primary	8522769	Foundry Lane Primary School	530		569		-39		-39
Primary	8522770	Shirley Warren Primary & Nursery School	377		397		-20		-20
Primary	8522771	Mason Moor Primary School, Nursery & Sen Unit	199		206		-7		-7
Primary	8523200	Bitterne Church of England Primary School	410		414		-4		-4
Primary	8523202	Freemantle Church of England Community Academy	410		390		20		20
All-through	8523203	St Mark's Church of England School	423	545	421	360	2	185	187
Primary	8523205	St Mary's Church of England Primary School & Nursery	586		524		62		62
Primary	8523655	Highfield Church of England Primary School	316		315		1		1
Primary	8523656	Springhill Catholic Primary School	655		652		3		3
Primary	8523657	Holy Family Catholic Primary School - Part of the Learning Fe	414		414				
Primary	8523658	St Patrick's Catholic Primary School	420		412		8		8
Primary	8523659	Harefield Primary School	416		410		6		6
Secondary	8524003	Oasis Academy Sholing		1,028		1,032		-4	-4
Secondary	8524004	Weston Secondary School		727		786		-59	-59
Secondary	8524262	Regents Park Community College		853		885		-32	-32
Secondary	8524270	Redbridge Community School		1,120		1,096		24	24
Secondary	8524275	Upper Shirley High School		1,081		1,068		14	14
Secondary	8524278	Bitterne Park School		1,851		1,863		-12	-12
Secondary	8524306	Woodlands Community College		902		903		-1	-1
Secondary	8524311	Cantell School		1,284		1,262		22	22
Secondary	8525415	Saint George Catholic Voluntary Aided College Southampton		1,024		1,002		22	22
Secondary	8525417	St Anne's Catholic School		1,081		1,089		-8	-8
Secondary	8526905	Oasis Academy Lord's Hill		769		840		-71	-71
Secondary	8526906	Oasis Academy Mayfield		892		901		-9	-9

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Appendix D: Provisional ISB allocations for 2025/26

SCC School	Phase	2025-26 NFF £m	Scenario 1 £m	Change £m	% Change	Scenario 2 £m	Change £m	% Change	Scenario 1.1 £m	Change £m	% Change	Scenario 2.1 £m	Change £m	% Change
		<b>£209.47</b>	<b>£208.67</b>	<b>£(0.80)</b>		<b>£208.67</b>	<b>£(0.80)</b>		<b>£208.45</b>	<b>£(1.02)</b>		<b>£208.45</b>	<b>£(1.02)</b>	
School 1	Primary	£2.56	£2.55	£(0.01)	-0.5%	£2.55	£(0.01)	-0.4%	£2.55	£(0.02)	-0.7%	£2.55	£(0.01)	-0.6%
School 2	Primary	£2.92	£2.91	£(0.02)	-0.5%	£2.91	£(0.01)	-0.5%	£2.90	£(0.02)	-0.7%	£2.90	£(0.02)	-0.6%
School 3	Primary	£2.49	£2.48	£(0.01)	-0.5%	£2.48	£(0.01)	-0.4%	£2.48	£(0.02)	-0.6%	£2.48	£(0.01)	-0.5%
School 4	Primary	£1.17	£1.16	£(0.01)	-0.5%	£1.16	£(0.01)	-0.4%	£1.16	£(0.01)	-0.7%	£1.16	£(0.01)	-0.6%
School 5	Primary	£1.88	£1.87	£(0.01)	-0.5%	£1.87	£(0.01)	-0.4%	£1.87	£(0.01)	-0.5%	£1.87	£(0.01)	-0.6%
School 6	Primary	£2.51	£2.51	£0.00	0.0%	£2.49	£(0.01)	-0.5%	£2.51	£0.00	0.0%	£2.49	£(0.01)	-0.5%
School 7	Primary	£1.18	£1.17	£(0.01)	-0.5%	£1.17	£(0.01)	-0.5%	£1.17	£(0.01)	-0.7%	£1.17	£(0.01)	-0.6%
School 8	Primary	£3.09	£3.09	£0.00	0.0%	£3.09	£0.00	0.0%	£3.09	£0.00	0.0%	£3.09	£0.00	0.0%
School 9	Primary	£2.06	£2.05	£(0.01)	-0.5%	£2.05	£(0.01)	-0.4%	£2.05	£(0.01)	-0.7%	£2.05	£(0.01)	-0.6%
School 10	Primary	£1.41	£1.41	£(0.01)	-0.5%	£1.41	£(0.01)	-0.4%	£1.41	£(0.01)	-0.5%	£1.41	£(0.01)	-0.5%
School 11	Primary	£1.24	£1.23	£(0.01)	-0.5%	£1.23	£(0.01)	-0.4%	£1.23	£(0.01)	-0.7%	£1.23	£(0.01)	-0.6%
School 12	Primary	£2.31	£2.30	£(0.01)	-0.5%	£2.30	£(0.01)	-0.4%	£2.30	£(0.02)	-0.7%	£2.30	£(0.01)	-0.6%
School 13	Primary	£1.28	£1.28	£0.00	0.0%	£1.27	£(0.01)	-0.4%	£1.28	£0.00	0.0%	£1.27	£(0.01)	-0.4%
School 14	Primary	£2.27	£2.26	£(0.01)	-0.6%	£2.26	£(0.01)	-0.5%	£2.25	£(0.02)	-0.7%	£2.26	£(0.01)	-0.6%
School 15	Primary	£1.28	£1.28	£(0.01)	-0.5%	£1.28	£(0.01)	-0.4%	£1.27	£(0.01)	-0.6%	£1.28	£(0.01)	-0.5%
School 16	Primary	£1.37	£1.37	£(0.00)	-0.2%	£1.37	£(0.01)	-0.4%	£1.37	£(0.00)	-0.2%	£1.36	£(0.01)	-0.5%
School 17	Primary	£2.14	£2.13	£(0.01)	-0.5%	£2.13	£(0.01)	-0.5%	£2.13	£(0.02)	-0.7%	£2.13	£(0.01)	-0.6%
School 18	Primary	£1.48	£1.48	£(0.00)	-0.1%	£1.48	£(0.01)	-0.4%	£1.48	£(0.00)	-0.1%	£1.48	£(0.01)	-0.6%
School 19	Primary	£2.15	£2.13	£(0.01)	-0.6%	£2.14	£(0.01)	-0.5%	£2.13	£(0.02)	-0.8%	£2.13	£(0.01)	-0.6%
School 20	Primary	£1.53	£1.52	£(0.01)	-0.5%	£1.52	£(0.01)	-0.4%	£1.52	£(0.01)	-0.7%	£1.52	£(0.01)	-0.6%
School 21	Primary	£2.19	£2.18	£(0.01)	-0.5%	£2.18	£(0.01)	-0.4%	£2.17	£(0.01)	-0.7%	£2.17	£(0.01)	-0.6%
School 22	Primary	£2.23	£2.21	£(0.01)	-0.5%	£2.22	£(0.01)	-0.4%	£2.21	£(0.01)	-0.7%	£2.21	£(0.01)	-0.6%
School 23	Primary	£1.32	£1.31	£(0.01)	-0.5%	£1.31	£(0.01)	-0.4%	£1.31	£(0.01)	-0.6%	£1.31	£(0.01)	-0.5%
School 24	Primary	£2.11	£2.09	£(0.01)	-0.6%	£2.10	£(0.01)	-0.5%	£2.09	£(0.02)	-0.8%	£2.09	£(0.01)	-0.7%
School 25	Primary	£3.58	£3.57	£(0.02)	-0.5%	£3.57	£(0.02)	-0.4%	£3.56	£(0.02)	-0.6%	£3.56	£(0.02)	-0.5%
School 26	Primary	£1.65	£1.65	£0.00	0.0%	£1.65	£0.00	0.0%	£1.65	£0.00	0.0%	£1.65	£0.00	0.0%
School 27	Primary	£2.25	£2.25	£0.00	0.0%	£2.24	£(0.01)	-0.5%	£2.25	£0.00	0.0%	£2.24	£(0.01)	-0.5%
School 28	Primary	£2.25	£2.24	£(0.01)	-0.6%	£2.24	£(0.01)	-0.5%	£2.23	£(0.02)	-0.7%	£2.23	£(0.01)	-0.6%
School 29	Primary	£6.61	£6.58	£(0.03)	-0.4%	£6.59	£(0.02)	-0.3%	£6.58	£(0.03)	-0.5%	£6.58	£(0.03)	-0.4%
School 30	Secondary	£9.39	£9.36	£(0.03)	-0.4%	£9.36	£(0.03)	-0.3%	£9.35	£(0.04)	-0.5%	£9.35	£(0.04)	-0.4%
School 31	Secondary	£13.15	£13.09	£(0.06)	-0.4%	£13.10	£(0.05)	-0.4%	£13.07	£(0.07)	-0.6%	£13.08	£(0.06)	-0.5%
School 32	Secondary	£7.59	£7.56	£(0.03)	-0.4%	£7.57	£(0.02)	-0.3%	£7.56	£(0.04)	-0.5%	£7.56	£(0.03)	-0.4%
School 33	Secondary	£10.19	£10.15	£(0.04)	-0.4%	£10.16	£(0.03)	-0.3%	£10.14	£(0.05)	-0.5%	£10.15	£(0.04)	-0.4%
School 34	Secondary	£7.02	£6.99	£(0.03)	-0.4%	£6.99	£(0.03)	-0.4%	£6.98	£(0.04)	-0.6%	£6.98	£(0.03)	-0.5%
School 35	Secondary	£6.75	£6.72	£(0.03)	-0.5%	£6.72	£(0.03)	-0.4%	£6.71	£(0.04)	-0.6%	£6.71	£(0.03)	-0.5%
School 36	All-through	£2.28	£2.27	£(0.01)	-0.5%	£2.28	£(0.01)	-0.4%	£2.27	£(0.01)	-0.6%	£2.27	£(0.01)	-0.5%
School 37	Primary	£1.28	£1.28	£0.00	0.0%	£1.27	£(0.01)	-0.4%	£1.28	£0.00	0.0%	£1.27	£(0.01)	-0.4%

School 38	Primary	£1.31
School 39	Primary	£2.17
School 40	Primary	£1.46
School 41	Primary	£3.06
School 42	Primary	£0.55
School 43	Primary	£1.89
School 44	Primary	£1.97
School 45	Primary	£3.05
School 46	Primary	£1.46
School 47	Primary	£2.25
School 48	Primary	£1.83
School 49	Primary	£1.40
School 50	Primary	£1.83
School 51	Primary	£1.40
School 52	Primary	£1.02
School 53	Primary	£1.44
School 54	Primary	£3.42
School 55	Primary	£0.96
School 56	Primary	£2.33
School 57	Primary	£0.85
School 58	Primary	£2.77
School 59	Primary	£2.33
School 60	Primary	£3.25
School 61	Primary	£2.39
School 62	Secondary	£7.54
School 63	Secondary	£6.23
School 64	Secondary	£7.85
School 65	Secondary	£7.92
School 66	Secondary	£6.42
School 67	Secondary	£6.99

£1.31	£0.00	0.0%
£2.16	£(0.01)	-0.6%
£1.46	£(0.01)	-0.5%
£3.06	£(0.01)	-0.3%
£0.54	£(0.00)	-0.4%
£1.89	£(0.01)	-0.3%
£1.97	£0.00	0.0%
£3.04	£(0.02)	-0.6%
£1.45	£(0.01)	-0.5%
£2.23	£(0.01)	-0.6%
£1.82	£(0.01)	-0.6%
£1.40	£0.00	0.0%
£1.82	£(0.01)	-0.6%
£1.39	£(0.00)	-0.1%
£1.02	£0.00	0.0%
£1.43	£(0.01)	-0.6%
£3.40	£(0.02)	-0.5%
£0.95	£(0.01)	-0.5%
£2.32	£(0.01)	-0.5%
£0.85	£(0.00)	-0.4%
£2.76	£(0.01)	-0.2%
£2.32	£(0.01)	-0.5%
£3.25	£0.00	0.0%
£2.38	£(0.01)	-0.5%
£7.51	£(0.03)	-0.4%
£6.20	£(0.02)	-0.4%
£7.81	£(0.03)	-0.4%
£7.88	£(0.03)	-0.4%
£6.42	£0.00	0.0%
£6.97	£(0.03)	-0.4%

£1.31	£(0.01)	-0.4%
£2.16	£(0.01)	-0.5%
£1.46	£(0.01)	-0.4%
£3.05	£(0.01)	-0.4%
£0.55	£(0.00)	-0.3%
£1.88	£(0.01)	-0.5%
£1.96	£(0.01)	-0.5%
£3.04	£(0.01)	-0.5%
£1.45	£(0.01)	-0.5%
£2.23	£(0.01)	-0.5%
£1.82	£(0.01)	-0.5%
£1.40	£(0.01)	-0.4%
£1.82	£(0.01)	-0.5%
£1.39	£(0.01)	-0.5%
£1.02	£(0.00)	-0.4%
£1.43	£(0.01)	-0.5%
£3.41	£(0.02)	-0.4%
£0.95	£(0.00)	-0.5%
£2.32	£(0.01)	-0.4%
£0.85	£(0.00)	-0.4%
£2.75	£(0.01)	-0.5%
£2.32	£(0.01)	-0.5%
£3.25	£0.00	0.0%
£2.38	£(0.01)	-0.4%
£7.51	£(0.03)	-0.3%
£6.21	£(0.02)	-0.3%
£7.82	£(0.03)	-0.4%
£7.89	£(0.03)	-0.3%
£6.39	£(0.03)	-0.5%
£6.97	£(0.02)	-0.3%

£1.31	£0.00	0.0%
£2.16	£(0.02)	-0.7%
£1.45	£(0.01)	-0.6%
£3.06	£(0.01)	-0.3%
£0.54	£(0.00)	-0.4%
£1.89	£(0.01)	-0.3%
£1.97	£0.00	0.0%
£3.03	£(0.02)	-0.7%
£1.45	£(0.01)	-0.7%
£2.23	£(0.02)	-0.7%
£1.81	£(0.01)	-0.8%
£1.40	£0.00	0.0%
£1.81	£(0.01)	-0.7%
£1.39	£(0.00)	-0.1%
£1.02	£0.00	0.0%
£1.43	£(0.01)	-0.7%
£3.40	£(0.02)	-0.7%
£0.95	£(0.01)	-0.6%
£2.31	£(0.01)	-0.6%
£0.85	£(0.00)	-0.4%
£2.76	£(0.01)	-0.2%
£2.31	£(0.02)	-0.7%
£3.25	£0.00	0.0%
£2.38	£(0.02)	-0.7%
£7.50	£(0.04)	-0.5%
£6.20	£(0.03)	-0.5%
£7.80	£(0.04)	-0.5%
£7.87	£(0.04)	-0.5%
£6.42	£0.00	0.0%
£6.96	£(0.03)	-0.5%

£1.31	£(0.01)	-0.4%
£2.16	£(0.01)	-0.6%
£1.46	£(0.01)	-0.5%
£3.05	£(0.02)	-0.6%
£0.54	£(0.00)	-0.4%
£1.88	£(0.01)	-0.6%
£1.96	£(0.01)	-0.5%
£3.03	£(0.02)	-0.6%
£1.45	£(0.01)	-0.6%
£2.23	£(0.01)	-0.6%
£1.82	£(0.01)	-0.7%
£1.40	£(0.01)	-0.4%
£1.82	£(0.01)	-0.6%
£1.39	£(0.01)	-0.6%
£1.02	£(0.00)	-0.4%
£1.43	£(0.01)	-0.6%
£3.40	£(0.02)	-0.6%
£0.95	£(0.01)	-0.6%
£2.32	£(0.01)	-0.6%
£0.84	£(0.00)	-0.5%
£2.75	£(0.02)	-0.6%
£2.32	£(0.01)	-0.6%
£3.25	£0.00	0.0%
£2.38	£(0.01)	-0.6%
£7.50	£(0.03)	-0.5%
£6.20	£(0.02)	-0.4%
£7.81	£(0.04)	-0.5%
£7.88	£(0.04)	-0.5%
£6.39	£(0.03)	-0.5%
£6.96	£(0.03)	-0.4%

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**SUBJECT:** SCHOOLS IN FINANCIAL DIFFICULTY GRANT  
**DATE:** 21 January 2025  
**RECIPIENT:** School's Forum – For Information

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1. Schools Forum asked for further detail on the proposed distribution of the schools in financial difficulty grant.
2. It should be noted that the Forum is not being asked to make a decision on the allocation of the grant. The Local Authority is presenting the proposed use for information and considering the feedback from the Forum.
3. The grant conditions don't permit a further carry forward of the grant beyond March 2025.
4. The requested information for budgeted in year movements are shown in the table below

School	Deficit Balance £M	Planned In Year reduction £M	Comment
Compass Pupil referral unit	1.138	0.362	Future years to be determined
Hardmoor Early Years Centre	0.705	0.073	Recovery 2030/31
Valentine Primary School	0.550	0.049	Recovery 2030/31
Mansbridge Primary	0.478	0.001	DRP not yet approved
Mason Moor Primary	0.469	0.158	to be updated
Shirley Warren Primary	0.421	0.085	to be updated
Townhill Junior	0.340	0.031	to be updated
Polygon	0.290	0.111	to be updated
St Marks School	0.267	0.338	Recovery 2024/25
Fairisle Infant	0.064	- 0.127	In year pressures. Planned recovery 2027/28
Bitterne Manor Primary	0.062	- 0.123	In year pressures. Planned recovery 2027/28
Oakwood Primary	0.052	0.061	Recovery 2024/25
St Mary's Primary	0.042	0.049	Recovery 2024/25
Highfield Primary	0.022	0.008	Recovery 2025/26

5. There are 2 schools which are experiencing pressures in year due to long term staff absence. Their DRPs have taken these pressures into account and do demonstrate plans to return to a surplus.
6. As a reminder the following table shows the schools' deficit balances, how the balance compares to the school's core funding and the proposed allocation of the grant with those schools in greatest need being targeted with the grant, subject to the conditions in paragraph 9.

School	Deficit Balance £M	Compared to Core funding (%)	Proposed Allocation (£M)
Compass Pupil referral unit	1.138	67%	0.145
Hardmoor Early Years Centre	0.705	70%	0.090
Valentine Primary School	0.550	17%	0.070
Mansbridge Primary	0.478	41%	0.061
Mason Moor Primary	0.469	37%	0.060
Shirley Warren Primary	0.421	19%	0.054
Townhill Junior	0.340	24%	0.043
Polygon	0.290	18%	0.037
<b>Total (a)</b>	<b>4.391</b>		<b>0.559</b>
St Marks School	0.267	5%	
Fairisle Infant	0.064	5%	
Bitterne Manor Primary	0.062	6%	
Oakwood Primary	0.052	3%	
St Mary's Primary	0.042	1%	
Highfield Primary	0.022	1%	

7. The grant will be allocated in this financial year. The totals shown are the minimum and assume conditions outlined in paragraph 9 are met.
8. The local authority has been allocated additional funding (£559,332) to support maintained schools which find themselves in financial difficulty. Local Authorities have been given flexibility regarding the use of the grant. The following guidelines have been provided:
  - a) Section 6.7 of the guidance on the DFE schemes for financing schools allows for local authorities to pay cash sums towards elimination of a deficit balance. This is designed for circumstances where it is not reasonable to expect the school to eliminate the whole of the deficit from its own future resources. Such cash sums can be charged to the dedicated schools grant (DSG) only where they form part of a contingency fund approved by maintained school members

of the schools forum under Regulation 11(5) of, and paragraph 51 of Schedule 2 to, the School and Early Years Finance (England) Regulations 2023.

- b) The DFE expect funding to be allocated on a case-by-case basis, taking into account the severity of the school's position and prioritising those in greatest need. Local authorities should report to their schools forum on how they are using the money.
  - c) Local authorities may wish to associate such conditions with the payment of money out of the sum that it may receive from the £20 million of additional funding. This could include mandating the use of some of the department's resource management tools and services, such as a School Resource Management Adviser (SRMA).
  - d) This funding can be used to support maintained primary, middle, secondary and all-through schools, maintained special schools, pupil referral units, and maintained nursery schools.
9. There are 8 schools with a deficit balance that is greater than 10% of their core funding. where their combined deficits represent 90% of the total. Given the size of the deficits it is recommended that the funding is used to target these schools, pro-rated by the deficit balance, subject to the following conditions.
- a. The school produces a Deficit Recovery Plan (DRP) and submits quarterly monitoring to schools finance. The DRP is refreshed with each budget update;
  - b. Where necessary the school makes use of the DFE's SRMA

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**SUBJECT:** Early Years Block 2025/26 Update  
**DATE:** 21<sup>st</sup> January 2025  
**RECIPIENT:** Schools Forum

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## 1. Purpose of this report

1.1 To provide information on initial 2025/26 early years budgets announced in December 2024 by the Education & Skills Funding Agency (ESFA).

## 2. Background

2.1 As announced in the 2024 Autumn Budget, Government expects to provide over £8 billion for the early years' entitlements in 2025/26, an increase of more than 30% compared with 2024/25, due to the expansion of the entitlements.

2.2 On 10<sup>th</sup> of December 2024, DfE published the new early years local authority core funding rates for 2025/26 as follows:

- The national average three and four-year-old hourly funding rates of local authorities is increasing by 4.1%,
- The two-year-old hourly funding rates is increasing by 3.3%,
- The nine months to two-year-old hourly funding rate is increasing by 3.4%

As usual, the hourly funding rates will vary between local authorities, reflecting the relative needs of the children and different costs of delivering provision across the country.

2.3 From September 2025, on top of over £8 billion through the core funding rates Government will be investing an additional £75 million of revenue funding in 2025/26 through an expansion grant, recognising the significant effort and planning to prepare for the final phase of the expansion. This grant is on top of over £8 billion provided through the core funding rates.

2.4 The early years allocations are currently based on the January 2024 pupil census count; they will be updated in July 2025 to reflect the January 2024 pupil census count and again in July 2025 so that 5/12 of the allocation reflects the January 2025 pupil census count.

2.5 Local authorities are expected communicate their rates to providers by **28<sup>th</sup> February 2025**. This will become mandatory from 2026-27.

## 3. Early Years Block 2025/26 Update

3.1 The indicative budgets for 2025/26 are set out below table.

	2025-26 DSG			2024-25 DSG			Net Change			% Change
	Pupil Nos.	Unit Value £s	DSG funding £m	Pupil Nos.	Unit Value £s	DSG funding £m	Pupil Nos.	Unit Value £s	DSG funding £m	
Under 2 Year Olds (Schs + PVI)	1,157.64	12.74	8.41	479.45	12.55	3.43	678.19	0.19	4.98	145.1%
2 Year Old disadvantaged (Schs + PVI)	507.65	9.34	2.70	507.65	9.20	2.66		0.14	0.04	1.5%
2 Year Old working parents (Schs + PVI)	1,062.80	9.34	5.66	684.82	9.20	3.59	377.98	0.14	2.07	57.6%
3&4 Year Old (Schs + PVI)	3,150.39	6.62	11.89	3,150.39	6.48	11.64		0.14	0.25	2.2%
3&4 Year Additional (Schs + PVI)	1,305.83	6.62	4.93	1,305.83	6.48	4.82		0.14	0.10	2.2%
EYPPG - 3&4 Year Olds	765.90	1.00	0.44	765.90	0.68	0.30		0.32	0.14	47.1%
EYPPG - 2 Year Olds	357.87	1.00	0.20	357.87	0.68	0.14		0.32	0.07	47.1%
EYPPG - Under 2 Year Olds	32.21	1.00	0.02	26.76	0.68	0.01	5.45	0.32	0.01	77.0%
MNS - 3&4 year olds	49.07	5.27	0.15	49.00	4.64	0.13	0.07	0.63	0.02	13.7%
DAF - 3&4 Year Olds	205.00	1.65	0.19	193.00	1.60	0.18	12.00	0.05	0.02	9.5%
DAF - 2 Year Olds	51.00	1.65	0.05	58.00	1.60	0.05	-7.00	0.05	(0.00)	-9.4%
DAF - Under 2 Year Olds	15.00	1.65	0.01	16.00	1.60	0.01	-1.00	0.05	(0.00)	-3.4%
<b>Total Early Years Block</b>	<b>8,660.36</b>		<b>34.64</b>	<b>7,594.67</b>		<b>26.96</b>	<b>1,066</b>		<b>7.68</b>	<b>28.5%</b>

3.2 There are currently gaps in both the provision and quality of early years education, particularly for disadvantaged children. To address this, the largest-ever increase to the Early Years Pupil Premium (EYPP) has been implemented. EYPP rates will rise by 47.1% per hour in 2024/25, reaching £1 per hour in 2025/26. This equates to up to £570 per eligible child annually (£1/hr x 15 hrs/week x38 weeks/year).

3.3 Eligible children can also receive £938 per child per year through the disability access fund to support reasonable adjustments for children with a disability. Government also expects to spend £92.6 million on maintained nursery school (MNS) supplementary funding in 2025/26, in recognition of the additional costs that MNSs face.

3.4 The key change in 2025/26 is that from April 2025, minimum pass-through requirement will increase, meaning that local authorities must pass on **at least 96% of funding to providers**, as part of a phased approach to a 97% pass-through in the future.

3.5 This is a demand led budget. Along with the impact of increase in population, cost of living increases effecting eligibility and unknown take up of the new entitlements results in uncertainty to the forecasts and allocations.

3.6 SCC will be consulting with providers on the detail of some of these changes shortly, as well as working through the associated cost implications to central services

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**SUBJECT:** SEND/High Needs Block Update  
**DATE:** 21<sup>st</sup> January 2025  
**RECIPIENT:** Schools' Forum

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## SUMMARY:

The Schools' Forum is asked to note:

Responses to Matters Arising from the December meeting:

- Updated EHCP demand forecast
- Current position on the High Needs Block and deficit
- HNB projections for next year and pressures moving forward

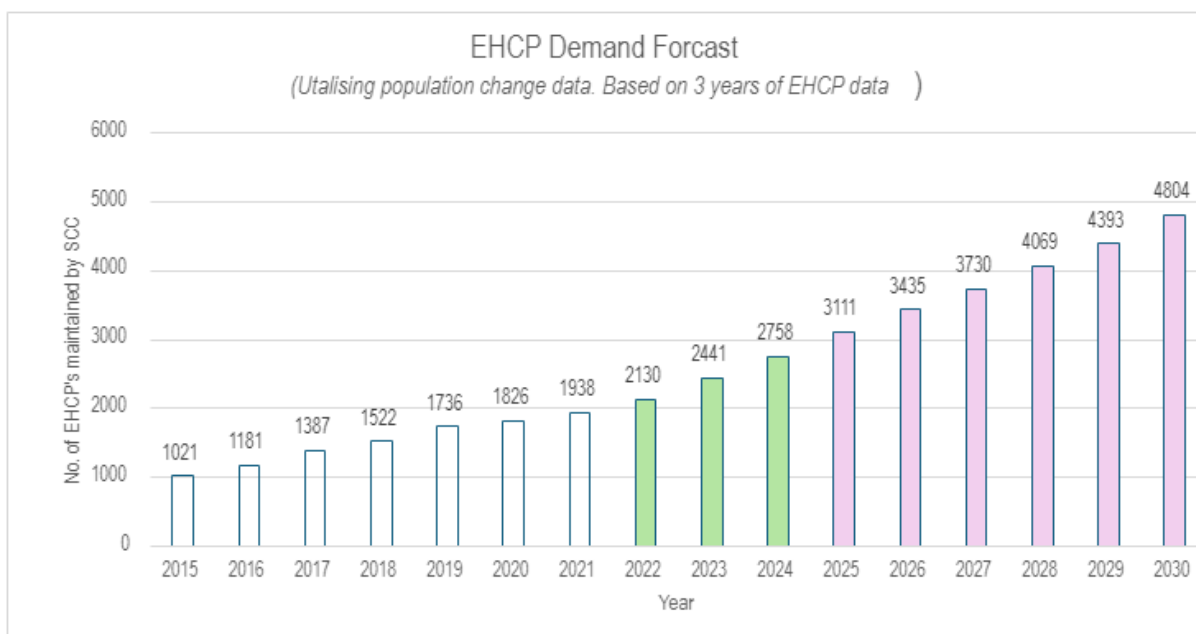
And general update items

- Report on the Time Limited Mainstream Inclusion Grant
- Updates on the £740m capital grant for mainstream school enhancements and resourced provisions (*standing report item*)

## Updated EHCP demand forecast

These are figures currently in the deficit management plan, the 2024 figure will be revised once the final SEND2 reporting phase is complete at the end of March.

Please note that the data capture is January each year for the previous year.



**Current position with high needs block and deficit.**

We are on track to reduce the HNB deficit by £1.5m this financial year. This is a slight improvement on the initial projection of £1.2m and is down primarily to cautious budgeting.

This will bring the remaining deficit figure to £5.606m carry forward into financial year 2025/26.

At the time of writing, we do not have any indication of the extension of the statutory over-ride for the repayment of the deficit from the General Fund which is currently March 31<sup>st</sup> 2026. We do anticipate that this will be extended.

### **HNB projections for next year and pressures moving forward.**

The indicative income amount for the HNB for 2025/2026 is £50,180,007.

Following the various recoupmets the remaining amount to be issued to Southampton is c£43,778,406. (*indicative figures from the DfE include c£5.48m of recoupmets but this does not include the place changes which we believe will add an additional £0.91m*)

There are a number of known adjustments planned for 2025/26, these include:

- Increase in Pupil Referral Unit funding for permanently excluded children (not EHCP bandings) (*decision pending ED approval and likely to be backdated to 1/4/2024*)
- Increase of 7% for hospital school funding as per DfE guidance
- Additional funding for post 16 places following a review of numbers this financial year
- Provisional allocation for the mainstream cluster funding programme should that continue following the pilot phase
- EHCP allocation plus 11% as per the indicative increase in numbers from January 2024 to January 2025
- Extension to the SIP funding to allow for the SEMH DBV work to continue to the end of the financial year pending a decision as to the future beyond then
- Increase in funding for the Newlands HI Unit as there have been no running costs associated with this provision previously and we can no longer rely on vacancy savings
- Maintenance of 10 additional AV Bots for the provision of accessible education to learners under Section 19 and also with EBSA
- General 3% uplift as standard

In addition we anticipate there being additional, non-quantified, pressures that we will need to take into consideration, these include:

- Any proposed deficit reduction target
- Additional costs associated with revenue costs for resourced provisions/SEN units in mainstream schools
- Additional costs potentially associated with the EHCP banding review currently underway in special schools but due to extend to all EHCPs over time – early findings are suggesting that this may need to be more heavily resourced
- An urgent request for a review of funding for one of our resourced provisions (50 EHCP places so critical to place planning)

The non-quantified pressures will need to be covered by the remainder of the budget once the known adjustments have been accounted for.

Currently, and pending further refinement of the budgets, the budget remainder is £2,075,910.

**Report on the Time Limited Mainstream Inclusion Grant**

This early report on trends and key themes can be found here for the context:

[Time Limited Mainstream Inclusion Grant](#)

With a click down to the report here:

[Time Limited Mainstream Inclusion Grant report](#)

**Update on the £740m capital funding to support mainstream**

As at January 8<sup>th</sup> there is no further update but we will keep this on the report agenda as requested.

<b>Further Information Available From:</b>	<b>Name:</b>	Juno Hollyhock Interim Head of SEND
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### **Time Limited Mainstream Inclusion Grant Report**

#### **Overview**

Southampton City Council had allocated funding in the High Needs block to support the implementation of the SEND Mainstream Funding Cluster Model proposal (webpage: [SEND Mainstream Funding Cluster Model \(southampton.gov.uk\)](https://southampton.gov.uk)).

Due to the changed timeframe of the SEND Mainstream Funding Cluster Model proposal to include further co-production on the proposal in the Autumn Term of the 2024-2025 Academic Year and a trial of the process without funding in the Spring Term of the 2024-2025 academic year, a percentage of that allocated funding remained available.

We wanted to ensure that this allocated funding is used to support children and young people with Special Education Needs and Disabilities (SEND) in our mainstream school communities.

As a result, we introduced the Time Limited Mainstream Inclusion Grant for mainstream school settings to access this allocated funding to support the development of a project based around Inclusive and SEND education to support students with SEND within the timeframe that the funding is allocated to.

This was a one-time process for mainstream settings to access which has formed as a result of the changes in the proposed time frame of the SEND Mainstream Funding Cluster Model proposal.

#### **Funding**

To reflect the varying school sizes across the city, we distributed the funding in the form of a grant that matches the size of a school. Settings were able to access a grant allocation that matched the population size of their school. This was as followed:

Small sized school (0-350 pupils) - £2500

Mid-sized school (351 – 800 pupils) - £3500

Large sized school (801 + pupils) - £5000

Settings could access either individual allocations or group allocations

#### **Panel Review**

All allocations were reviewed by a panel to ensure that proposed projects met the guidance for spend for the High Needs Funding Block.

The panel consisted of members of staff from:

- School representatives, including those in Headteacher and SENCo role
- Southampton City Council SEND and Education Team
- Parent/Carer Forum

The Panel will also conduct a review of the impact of the projects that have been funded from the grants after a period of two terms.

### **Key Themes and Focus Areas from Allocation**

All grant allocations were awarded to mainstream schools either through individual allocations or group allocations. Below are some key themes and focus areas from the allocation information provided:

#### Key Themes

##### **Sensory Rooms and Spaces**

Many schools are focusing on creating or enhancing sensory rooms to support students with sensory processing needs. These spaces are designed to help students regulate their emotions and behaviours.

##### **Emotional and Social Support**

Projects aimed at improving social, emotional, and mental health (SEMH) through various interventions, including Zones of Regulation, nurture groups, and emotional literacy programs.

##### **Communication and Interaction**

Several projects focus on improving communication skills for students with autism and other communication needs using tools like PECS (Picture Exchange Communication System) and Widgit.

##### **Inclusive Teaching and Adaptive Learning**

Schools are investing in training for staff on adaptive teaching strategies and inclusive practices to better support students with diverse needs in the classroom.

##### **Outdoor and Practical Learning**

Some projects emphasize the benefits of outdoor learning and practical skills-based activities, such as Forest Schools, to engage students and support their holistic development.

##### **Assessment and Intervention Tools**

There is a focus on purchasing assessment tools and intervention programs to identify and support students' specific learning needs, particularly in literacy and numeracy.

#### **Most Common Focus Areas**

##### **1. SEMH (Social, Emotional, and Mental Health)**

Approximately 60% of the projects focus on social, emotional, and mental health support. This is the most common focus area, with many projects aiming to support students' emotional regulation, reduce anxiety, and improve social skills.

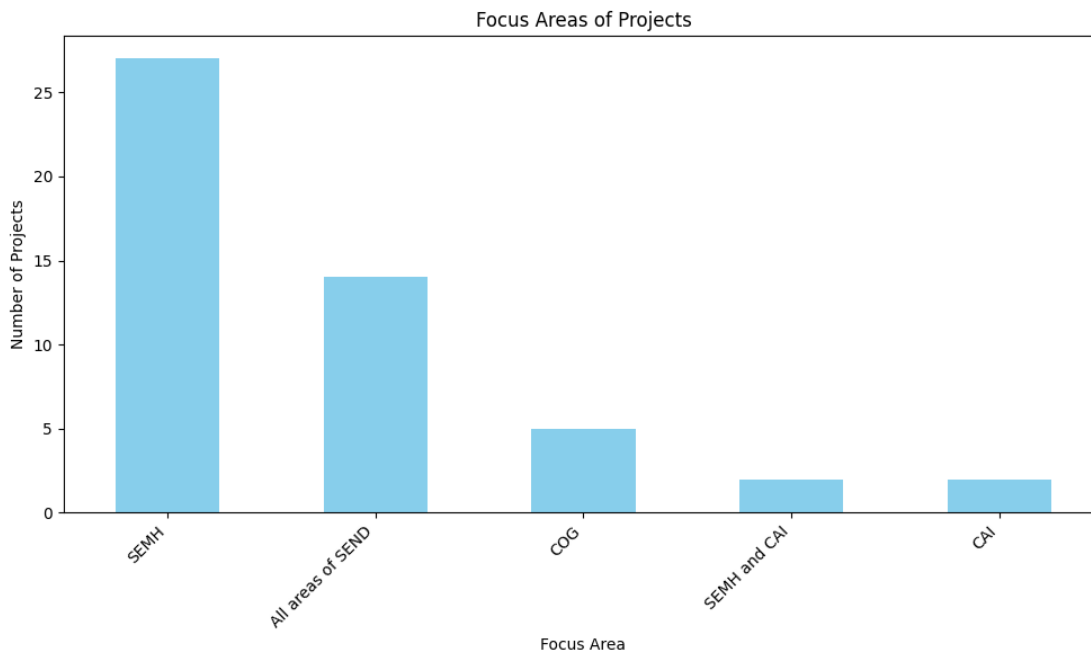
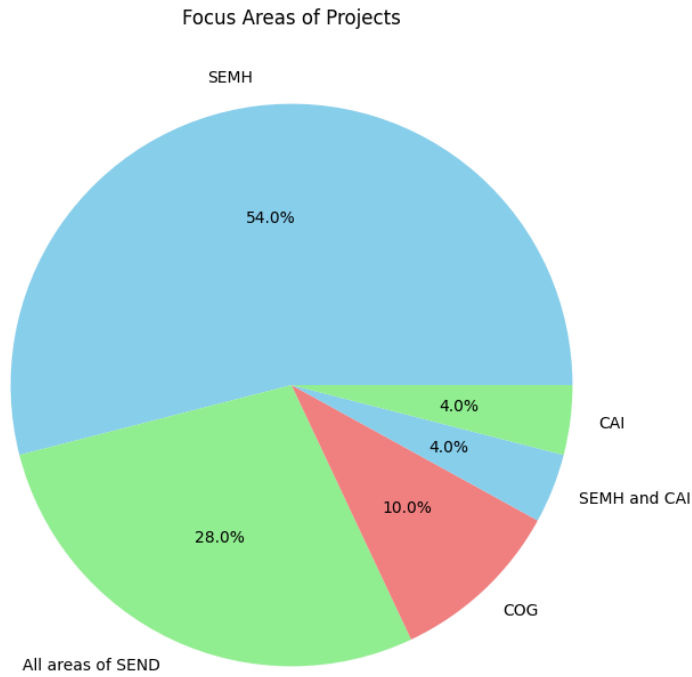
##### **2. COG (Cognition and Learning)**

Around 25% of the projects aim to improve cognition and learning, particularly through targeted interventions. Projects targeting cognitive development, particularly through literacy and numeracy interventions, are also prevalent.

##### **3. CAI (Communication and Interaction)**

## Time Limited Mainstream Inclusion Grant Report

About 15% of the projects focus on communication and interaction improvements. Enhancing communication skills for students with autism and other communication needs is a significant focus.



### Examples of Projects by Focus Area

- **SEMH:**
  - Project: Creating a sensory room to support emotional regulation.
  - Project: Implementing Zones of Regulation and Widget for inclusive teaching.
- **COG:**
  - Project: Using Dyslexia Gold and Widgits program to improve literacy skills.
  - Project: Implementing the White Rose Primary Intervention Programme for maths.
- **CAI:**
  - Project: Launching PECS to support communication for SEND pupils.
  - Project: Using Widgit to support communication and interaction needs.

### **Overall Insights**

#### **Emphasis on Mental Health and Emotional Support:**

The strong focus on SEMH projects underscores the growing recognition of the importance of mental health in education. Schools are prioritising interventions that support emotional regulation, reduce anxiety, and improve social skills.

#### **Holistic Approaches:**

The combination of SEMH and CAI projects indicates that schools are adopting holistic approaches to support students with SEND. By addressing both emotional well-being and communication skills, these projects aim to create more inclusive and supportive learning environments.

#### **Targeted Interventions:**

The focus on cognition and learning projects highlights the need for targeted interventions to improve academic outcomes. Schools are investing in programs and resources that support literacy and numeracy development for students with learning difficulties.

### **Next Steps**

- Share best practice for Mental Health and Emotional Support Initiatives:
  - Continue to prioritize funding and support for SEMH (Social, Emotional, and Mental Health) projects (such as the SEMH Graduated Approach and SEMH transition initiatives), as these are the most common and critical areas of need.
  - Share best practice on SEMH initiatives, particularly sensory room practice through various avenues (such as OAP guide, Inclusive Education Padlet, SEND/Inclusion Events, Cluster model pilot)
- Monitor and Evaluate Impact:



## **Time Limited Mainstream Inclusion Grant Report**

- The Panel will conduct a review of the impact of the projects that have been funded from the grants after a period of two terms.
- Promote Collaboration and Sharing of Best Practices:
  - Provide opportunities to share best practice from the projects, including presentation of success projects as events such as the SEND/Inclusion event 2025, SENCo Hub and at Cluster meetings as part of the pilot

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