

NORTHUMBERLAND COUNTY COUNCIL

SCHOOLS' FORUM

At a meeting of the Schools' Forum held in Committee Room 1, County Hall, Morpeth on Wednesday, 2 October 2019 at 9:30 am.

PRESENT

C Pearson (in the Chair)
Trustee, Three Rivers Learning Trust

Headteacher Representatives

M Deane-Hall, Glendale Middle	F Hartland, Kielder First
M Hall, The Duchess Community High	B Ryder, Berwick Middle

Governor Representatives

K Faulkner, Morpeth Collingwood Special School	S Heminsley, Newbrough CE Primary
S Harker, James Calvert Spence College	I Walker, Governor, The Duchess Community High
	B Watson, St Robert's RC First

Academies Representatives

G Atkins, Hadrian's Trust	S Wild, Castle School (NCEA Trust)
A Thelwell, Bede Academy	

Early Years' Representative - None present

Trades Union Representatives

R E Woolhouse

16 - 19 Provider of Education Representative

S Morgan Evans

Northumberland County Council Elected Members - None present

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OFFICERS IN ATTENDANCE

D Illingworth	Children's Improvement and Development Manager
D Jackson	Service Director - Education and Skills
K Norris	Democratic Services Officer
B Parvin	Education and Skills Business Manager
R Pickering	Senior SEND Manager
A Russell	Principal Accountant
D Street	Commissioner for Early Years & Primary

Observers: A Kingham (Director of Business Development), C Ponting (Senior Manager, Schools HR),

14. MEMBERSHIP AND MEMBERSHIP UPDATE

- 14.1 There had been a number of changes since July's meeting for various reasons:
- Ben Ryder, headteacher of Berwick Middle School had replaced Jane Kennedy;
 - Suzanne Connolly, headteacher of Felton C of E Primary School had resigned;
 - Colin Bradshaw, Barndale Special School had resigned;
 - Katie Morrison had stood down as early years representative following the closure of RASCALS.
- 14.2 In terms of replacements, notifications had been sent out via the e-courier inviting expressions of interest. One had been received for the maintained special school place and, if no more interests were received, the application would be taken forward on that basis.
- 14.3 An update on membership would be provided to November's meeting.

AGREED that the information be noted.

15. APOLOGIES FOR ABSENCE

Apologies for absence were received from K McGrane, E Potts, D Wylie, Councillor W Daley, S Aviston and T Cameron.

16. MINUTES AND MATTERS ARISING

- 16.1 **RESOLVED** that the minutes of the meeting of the Schools' Forum held on Wednesday, 3 July 2019, as circulated, be confirmed as a true record and signed by the Chair.

Matters Arising:

- 16.2 Minute 3.2: Haydon Bridge - Good progress had been made. An Ofsted inspection was expected this term and additional facilities would be opening on 1 November. A small number of students had enrolled for vocational courses and a large intake

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of students was expected next September at which time more publicity would take place.

- 16.3 Minute 3.3: Task and Finish Group - A report of the Task and Finish Group would be presented to the Family and Children's Overview and Scrutiny Committee the following day with a view to scrutiny making recommendations about the way forward. It was a public document which had been published on the Council's website.
- 16.4 Minute 4 (b): Letter from Corbridge Middle School Chair of Governors - The Formula Funding Sub Committee (FFC) had met and had agreed to adopt the procedure outlined in the Minutes and exclude premises funding when calculating the need for additional funding. This was a positive outcome for the 3 tier school education system and Mr Atkins thanked the Schools' Forum for supporting the campaign whilst encouraging those who had not made an individual response to do so.
- 16.5 Minutes 9: Education Growth Funding Policy - Specific representations had been made and considered by the FFC. Whilst not unsympathetic the committee had felt funding should not be changed for two reasons:
1. Essentially there was a period of time to allow schools to mitigate their financial position;
 2. all schools were at risk of falling pupil numbers and had to adapt accordingly.

17. COMMUNICATION

(a) Draft Minutes of the FFC, 17 September 2019

- 17.1 Mr I Walker, Chair of the above committee, presented the above minutes stating that some items had already been referred to and others would be discussed later in the meeting.

(b) Draft Minutes of the AEN Sub Committee, 25 September 2019

- 17.2 The Chair presented the above minutes stating that it had been decided to change the name of the committee to the High Needs Sub Committee in order to better reflect the purpose of the group.
- 17.3 The Director of Education and Skills had been asked to update Schools' Forum about structural issues and policy development.
- 17.4 A Draft SEN Payment Policy had been agreed by the committee and circulated the previous day. It showed how schools could attract additional funding and was considered to be a clearer and fairer policy.
- 17.5 Additional members of the High Needs Sub Committee were needed. The primary sector was under-represented and if anyone was interested they were asked to contact the Education and Skills Business Manager.

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- 17.6 In response to a question, it was stated that the deadline for bids regarding the new special school in Blyth was Monday, 30 September and it was confirmed that bids had been received.

(c) F40 Response to Government Spending Review Announcement

- 17.7 This would be discussed as part of agenda item 10 - National Funding Formula & DSG update.

AGREED that the information be noted.

18. SCHOOLS' FORUM MEMBERSHIP

- 18.1 This had been discussed earlier in the meeting.
- 18.2 The Education and Skills Business Manager welcomed Sara Morgan-Evans as substitute member for Jen Bell, 16 - 19 Provider of Education Representative.

19. SPECIAL EDUCATIONAL NEEDS IN NORTHUMBERLAND 2019

- 19.1 Mr R Pickering, Senior SEND Manager, introduced the above report which provided data on the number of children and young people with Education, Health and Care (EHC) plans in Northumberland. The report also provided data on the administration of EHC plans. (A copy of the report is filed with the signed minutes of the meeting as agenda item 7.)
- 19.2 The general trend had seen an increase in young people with EHC plans in Northumberland. From 2017 to 2019 numbers were up by 25%. This put pressure on the High Needs Block as many pupils were requesting places in special schools.
- 19.3 Numbers of pupils for whom the authority maintain a statement of special educational needs or an EHC plan were provided for specific age groups, and it was noted that the number of over 20's had dropped from last year because of work carried out between the Local Authority and colleges. However, there were challenges around this and current figures were not yet known.
- 19.4 Since January, there had been a considerable number of requests for EHC plan assessments. Previously there were non EHC plan pupils with complex needs being funded via top-up but that approach was no longer being supported. Details of a replacement approach, Short Term Additional Resourcing (STAR), were provided. It was currently unclear how many cases would convert to EHC plans in the long term.
- 19.5 The Education and Skills Business Manager said the report was based on the January 2018 census when 425 children received additional SEN funding but did not have an EHC plan. As a benchmark the position at January 2019 was included in the policy. By this point the number of pupils without plans in receipt of funding

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had fallen to 155 and there had since been a further decrease to 76 which was a credit to the SEN team.

- 19.6 There had been a significant improvement to the time scale for carrying out EHC plan assessments. There was a high number of reviews to process which had an impact on staff and additional resources were needed to meet those requirements.
- 19.7 Of the EHC plans issued in Northumberland, 20% required special school places. This was above the national average but below the North East average.
- 19.8 It was queried if the process was more responsive to schools that needed urgent funding. In response it was stated that all schools had to go through the same process but this process was more robust. For example if there was a medical issue or a family crisis the process would be more responsive to that but it was not meant to be a long term plan. It was a fine balancing act about meeting needs.
- 19.9 Discussion took place about historical deficits and transferring funds from the Schools' Block. Mr Atkins stated it was a perennial issue and pressure on the Schools' Block was immense. From a strategic point of view he felt that Schools' Forum should challenge this. There should be confidence across the county that needs were valid and that resources were being used efficiently. In response the Director of Education and Skills pointed out there was a growing need for specialist provision and said, for the first time in the last few years, there was an opportunity to combine the strategic direction with what was happening in individual schools.
- 19.10 Mr Faulkener welcomed extra funding for special schools which would address pressure on their budgets and reduce overspend. There was a lengthy waiting list for children to get a place in special schools and he had been advised that these children were becoming more challenging. Extra funding was therefore needed and he agreed that it should be addressed strategically for the long term.

AGREED that the Director of Education and Skills provide an update on the strategic approach to the next meeting of the High Needs Sub Committee and subsequently to the meeting of the Schools' Forum on 20 November.

20. SCHOOLS FINANCIAL INFORMATION

- 20.1 The Education and Skills Business Manager introduced the above report which informed the Forum of the position regarding school balances as at 31 March 2019 (a copy of which is filed with the signed minutes of the meeting as agenda item 8).
- 20.2 At this stage it was not appropriate to report individual school balances as budget work was ongoing. Further information would be provided once those figures were published by the DfE and in the public domain.
- 20.3 Of the 125 schools maintained, overall balances had increased by £90k and differences between the different phases were set out in the table at the top of page 2 of the report.

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- 20.4 An analysis of movement in maintained school balances was provided and it was noted that overall balances had increased by 2.5% over 12 months. The 9.3% fall in special school balances was due to a £420,000 contribution to capital. Maintained secondary school balances continued to fall but the small number of schools in this group meant that each had to be judged on its own merits.
- 20.5 Mr Atkins commented that 3 secondary schools were in deficit of just over £2 million and asked what plans were in place to address that? Should they wish to academise did this then pose a risk to schools in Northumberland? In response it was stated that it was the Council's responsibility to pay off the deficit so this represented a financial risk to the Council, not its schools.
- 20.6 The Chair said it would be helpful to have an extra column to show the number of schools in each phase. The Education and Skills Business Manager clarified the numbers as follows:
- | | |
|------------------|--|
| First/Primary - | 102 maintained schools |
| Middle - | 10 maintained schools |
| High/Secondary - | 5 maintained schools |
| Special - | 8 maintained schools (including the PRU) |

AGREED that the information be noted.

21. 2019/2020 NORTH EAST AUTHORITIES FORMULA VALUE INFORMATION

- 21.1 The Education and Skills Business Manager introduced the above report which provided information regarding the respective formula values used by the 12 North East local authorities and neighbouring authority in Cumbria in 2019/20 (a copy of which is filed with the signed minutes of the meeting as agenda item 9).
- 21.2 A slide presentation was provided to show an overall comparison of funding levels across those authorities in relation to Primary Age Weighted Pupil Unit (AWPU), KS3 AWPU, KS4 AWPU, FSM Primary, FSM Secondary, IDACI Primary B, IDACI Secondary B, Deprivation as a % of DSG, Primary Low Prior Attainment, Secondary Low Prior Attainment, Primary Lump Sum and Secondary Lump Sum. (A copy of the presentation is filed with the signed minutes of the meeting.)
- 21.3 The formula values reflected the respective decisions made by local authorities on how to allocate funding to schools, overall allocations to individual LAs would reflect National Funding Formula (NFF) values. The Government had indicated that individual formula values would be revised for 2020/21 but this information was not yet available.
- 21.4 With reference to FSM Primary, at £676 Northumberland had the highest value of the authorities in the sample. Historically Northumberland had not used the FSM forever 6 indicator, where a child had been on Free School Meals at any time in the past 6 years, but had introduced this, as well as the current FSM indicator, in 2018/19. Whether the FSM indicators could be sustained at levels above NFF for 2020/21 would need to be considered as part of the not used free school meals

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indicator. This had been introduced in 2018/19 because both elements were used. It was not an element used by North Tyneside per se.

- 21.5 In terms of benchmarking deprivation, Deprivation Affecting Children Index (IDACI) data was not based on the position of individual families but was based on postcodes which were grouped into 7 bands. Nationally there had been a review of those bands but it was not intended to use them in the 2020/21 figures, it was understood that this was to be introduced for 2021/22.
- 21.6 Northumberland was in line with NFF values for all bands except for Band B Where it paid above the NFF figure for both Primary and Secondary.
- 21.7 As an overall indication of the level of deprivation funding allocated, Northumberland paid 9.2% which was below the average of 11%. This was not a result of lower formula values, but of relatively lower overall levels of deprivation.
- 21.8 The Government had reiterated its intention to move to a 'hard' formula but had not confirmed when.
- 21.9 In response to a question about the implications of deviating above or below benchmark levels, the Education and Skills Business Manager referred to the National Funding Formula Information report circulated for July's meeting, particularly around AWPU and primary low prior attainment which was essentially because of historical funding and the approach taken. There had been a gradual steady move towards NFF to avoid radical change and it was intended to move forward on that basis.
- 21.10 The Education and Skills Business Manager confirmed that a copy of his slide presentation would be circulated to members of the Schools' Forum after the meeting.
- 21.11 In order to provide a better understanding, the Director of Education and Skills agreed to provide a briefing to outline how funding had previously been allocated and the potential implications of the move to the new NFF system.
- 21.12 It was queried if Northumberland could move to the NFF sooner and what the implications of that would be. The Education and Skills Business Manager stated that if Northumberland was to radically change the formula values it would still be required to match previous per pupil figures on schools who lost out due to the Minimum Funding Guarantee (MFG). The overall pot would not increase, though this was likely to be less of an issue this year due to anticipated overall funding increases. School Forum was reminded that calculations were "per pupil" and falling roll numbers would result in less funding.
- 21.13 Further discussion took place about free schools meals and the low prior attainment (LPA) figures and whether higher levels of FSM payments compared to NFF values compensated for the lower LPA figures. Reference was again made to July's report and it was stated that primary schools receiving funding for free school meals were assisted but not to the full extent.

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AGREED that

- (i) The information be noted;
- (ii) A copy of the slide presentation be circulated to members of the Schools' Forum;
- (iii) A briefing on the funding system be provided.

22. NATIONAL FUNDING FORMULA & DEDICATED SCHOOLS GRANT UPDATE

- 22.1 The Education and Skills Business Manager introduced the above report which provided further additional information in respect of the continuing implementation of the National Funding Formula (NFF), the Dedicated Schools Grant (DSG) and associated 2020/21 Schools' Funding information (a copy of which is filed with the signed minutes of the meeting as agenda item 10).
- 22.2 Background information and the key reasons why the DfE had introduced the NFF were provided.
- 22.3 Latest guidance had reiterated the DfE's intention to move to a 'hard' NFF but no specific timescale had been provided, therefore, in 2020/21 local authorities would continue to have some discretion over their schools funding formula.
- 22.4 The latest information was set out in paragraph 4 of the report. An error was pointed out in the second bullet point which should state £5,000 for secondary in **2020/21** not primary in 2021/22 as indicated.
- 22.5 Paragraph 5 highlighted the potential implications for Northumberland. It was stated that pupil numbers were instrumental to this and it was important that the caveats, as set out, were understood
- 22.6 In terms of Appendix A, the Education and Skills Business Manager had outlined the potential impact on the DSG based on information currently available, such as the Ministerial Statement shared under item 5 Communications. He explained the purpose of each column stating that he had used the latest available information to interpret the figures and had applied 4% as an inflationary uplift generally, with the exception of free school meals and PFI, where lower percentage increases applied.
- 22.7 A potential adjustment had been added for the reduced transfer from the Schools Block to the High Needs block. This could potentially return up to £900,000 to the Schools Block for illustrative purposes. It was estimated that this would result in between £183.7 million and £184.2 million for distribution between Northumberland schools but it was emphasised that these figures were illustrative and indicative due to final figures being based on October 2019 School Census numbers.
- 22.8 In order to have a better understanding, it was queried if a per pupil value could be multiplied by the new roll. In response it was stated that would be valid but there

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could potentially be changes in the school population e.g. around numbers on FSM. On a per pupil basis, the potential estimated increase for the 2020/21 was between 3.2 and 3.5%.

- 22.9 With regard to Appendix B, illustrative individual school figures were shown at a range of values, distributing between £183.7 million and £184.2 million as calculated in Appendix A. The approach had been kept simple and minimum per pupil funding values had not been factored in although there was a potential to do so once further information was received from the ESFA.
- 22.10 Discussion then took place about funding for the high needs block and the intention to reduce the deficit. It had been pledged 12 months ago that 1% would not be taken from the schools block next year for high needs and it was hoped that it would drop to 0.5%, with as much as possible being retained by the schools block. An increase in high needs funding in line with levels indicated by Government should enable this and, although there would still be a deficit over the next 2 years, the intention was to reduce this through careful management.
- 22.11 A timetable to highlight the process was provided at Appendix C of the report. Reference was made to it being school census day the following day and members were encouraged to ensure their returns were as accurate as possible.
- 22.12 Reference was also made to the following dates and it was stressed that the next meeting in November was key in relation to consultation on 2020/21 school funding:
- 15 October 2019 - the next meeting of the Formula Funding Committee;
 - 20 November 2019 - the next meeting of the Schools' Forum;
 - 14 January 2020 - A meeting of the Cabinet to agree education funding for 2021.
- 22.13 In terms of paragraph 6, De-delegated funding, an element which needed to be addressed was the contingency for reorganisation/restructuring. No significant spending was anticipated and there would be no impact on school budgets. The permission of the Schools' Forum was being sought to transfer £101,000 funding from the reorganisation contingency to allow more work in relation to the prevention of exclusions. This would create additional capacity to reduce permanent exclusions and consequently pressures on the high needs block.
- 22.14 Discussion took place about the costs involved around exclusions and how the agreement to transfer the funds would be an example of "invest to save" with anticipated future benefits in respect of lower spending on alternative provision for permanent exclusions.
- 22.15 Reference was made to the lack of alternative provision. A motor provision had been opened at Atkinson House but it was acknowledged that more providers were needed. The offer from the Learning and Skills Service was not at the desired level but this was being developed for some of the county's more vulnerable learners post 16. In 2018/19 six learners with EHC Plans successfully completed an

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employability programme in the Berwick area. This model was now being repeated in Alnwick in response to local demand. In addition an initial pilot was underway with Active Northumberland to provide physical exercise for young people, along with maths and english, and this had real possibilities in terms of self development.

- 22.16 Discussion took place about the costs involved in providing alternative provision and the morality element of spending large amounts of money on one individual which could be spent on the wider majority.
- 22.17 The Director of Education and Skills said he had met with the Chief Executive of Northern Education to express/share concerns about previous exclusion levels at Blyth Academy and it was hoped that a firm proposal from them to support the Council in reducing exclusions would be received.

AGREED that the reclassification of £101,000 of 2019/20 contingency funding be used for the purposes of providing services and to grow the capacity of the exclusion team in order to reduce the number of permanent exclusions.

23. 2019 WORK PROGRAMME AND MEETING DATES

- 22.1 Reference was made to the above (a copy of which is attached to the signed Minutes as agenda item 11). The Education and Skills Business Manager pointed out an error and stated that the first date should have been listed as Wednesday, 02 October.
- 22.2 The Forum was advised that the next meeting was crucial and would take place on Wednesday, 20 November. All were encouraged to attend.
- 22.3 No meetings were scheduled between February and July but if any additional meetings were required they would be arranged accordingly.

AGREED that the information be noted.

23. ANY OTHER BUSINESS

Maurice Hall asked if it would be possible for the Forum to be updated on pupil numbers, current trends, numbers of new properties being built etc. The Director of Education and Skills confirmed that could be done and also referred to the School Organisation Plan.

CHAIR _____

DATE _____

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