

NORTHUMBERLAND COUNTY COUNCIL

SCHOOLS' FORUM

At a virtual meeting of the Schools' Forum on Wednesday, 16 November 2022 at 9.30 a.m.

PRESENT

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

Headteacher Representatives

M. Dean-Hall, Wooler First School
A. Mead, Cramlington Hillcrest
School

F. Hartland, Kielder Primary School
N. Rodgers, James Calvert Spence
College

Governor Representatives

K. Faulkner, Collingwood School
B. Mansfield, Newbrough Primary
School

G. Wilkins, St Wilfrid's RC Primary
School

Academies Representatives

G Atkins, Hadrian Learning Trust

A. Hardie, NCEA Trust

Roman Catholic Diocese – Vacant Post

Church of England Diocese – N. Threlfall

EYDCP-PVI – K. Dickinson

Pupil Referral Unit Representative – Vacant Post

Trades Union Representative – Vacant Post

19-19 Provider of Education Representative – W. Stephenson

OFFICERS IN ATTENDANCE

A. Kingham
D. Street
S. Aviston

Service Director – Education and Interim DCS
Deputy Director of Education

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B. Parvin	Head of School Organisation and Resources Team
C. Ponting	Educations and Skills Business Manager
A. Russell	Senior Manager – Schools HR
A. Todd	Principal Accountant – Non-Team Leader
	Democratic Services Officer

18. MEMBERSHIP AND MEMBERSHIP UPDATE

- 18.1 The Chair announced that this would be Fay Hartland’s last meeting as she was retiring. Members thanked Fay for her valued contribution to the work of the Forum, and for the time she was able to devote to attend meetings.
- 18.2 It was noted that there was to be a refresh of forum membership in the new year to hopefully generate some new members.

19. APOLOGIES FOR ABSENCE

- 19.1 Apologies for absence were received from B. Watson, A. Thelwell, Councillor G. Renner-Thompson, Councillor R. Wearmouth and M. Finlay.

20. MINUTES AND MATTERS ARISING

RESOLVED that the minutes of the meeting of the Schools’ Forum held on Wednesday, 28 September 2022, as circulated, be confirmed as a true record and signed by the Chair.

21. COMMUNICATIONS

21.1 FFC Committee Draft Minutes 2 November 2022

The Formula Funding Sub Committee draft Minutes of 2 November 2022 were circulated and filed with the signed minutes.

21.2 F40 Letter to Rishi Sunak

Members received the F40 Letter to the Prime Minister urging Government to make education and SEND a priority (a copy of the letter has been filed with the signed minutes).

RESOLVED that the communications be noted.

22. FUNDING FOR UKRAINIAN STUDENTS

Ch.’s Initials.....

- 22.1 Members received a report which advised of the approach to be taken in relation to the distribution of Education funding for Ukraine students arriving under the Homes for Ukraine Scheme. (A copy of the report has been filed with the signed minutes).
- 22.2 It was reported that there were currently around 270 Ukraine students in schools and PVI's across Northumberland. The funding available was only available to those families that have entered through the Homes for Ukraine Scheme.
- 22.3 The Government's view was that Ukraine families should simply receive support through the usual channels available. The Council's website had a large range of resources and support available through specialist education teams.
- 22.4 The number of Ukraine students in schools continued to increase and the spread of children did not seem to be concentrated to one area of the county. However, there were some hot spot areas. School placement was determined by location of the host families, but the main priority was to have the children educated as close to their new home as possible depending on their particular need. A map identifying the distribution of Ukraine students across the county would be shared with Schools' Forum following the meeting.
- 22.5 There was an indication of funding only for the current 2022/23 financial year, as it was anticipated that students would feature in the October 2022 School Census. It was reported that the situation would continue to be monitored and updates shared with the Schools' Forum when available.
- 22.6 It was noted that the Council did passport all funding for Ukraine students direct to schools. Northumberland had also set aside funding to enable some wrap around services for children and families and increased resources available through the ESL Team to further support.
- 22.7 It was reported that schools appreciated the extra funding to help accommodate Ukraine students.
- 22.8 The local authority support workers who had visited schools were discussed and comments were made on the positive impact they had on the new students and schools involved.

RESOLVED that the report be noted.

23. SEN UPDATE – NORTHUMBERLAND INCLUSIVE EDUCATION SERVICE (NIES)

- 23.1 The report provided Schools' Forum with the impact assessment of the new model of delivery for NIES HINT Teams made possible by transfer of funds from DSG, operationalised in September 2020. (A copy of the report has been filed with the signed minutes).
- 23.2 It was reported that in September 2020, a new model of delivery was introduced and implemented across the teams within HINT; Autism Support, Emotional

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Wellbeing and Behaviour Support (EWB), Specific Learning Difficulties (SpLD), and Speech, Language and Communication Support (SLCN).

- 23.3 Members would remember that in November 2019, the Forum agreed to the continued transfer of £1m from the DSG into the High Needs Block. This model was introduced in September 2020 as a 2-year pilot. The transfer from the Schools Block to the High Needs Block had subsequently been reduced due to the increases in High Needs Block funding.
- 23.4 It was noted that in addition to providing access free on delivery, the new model created an opportunity for a single point of referral into the teams, streamlining the process for schools and allowing referrals to be reviewed and allocated to the correct team by the HINT Manager and Lead Practitioners, based on referral information. Inter team referrals had also been made possible.
- 23.5 It was advised that the quantitative data detailed within the report was a comparison over 4 years. The number of referrals received and responded to by HINT showed a 42% increase from 2018/19 to 2021/22. The number of schools who had utilised HINT had shown an increase of 16% when comparing 2018/19 with 2021/22. It was noted that the teams had worked with almost every school across the county during this academic year, a total of 163 out of 167 schools.
- 23.6 It was advised that training was a crucial aspect of the work of the support teams. From 2018/19 to 2021/22 there had been a 42% increase in the number of training courses delivered into schools. The training offer was wide and varied, covering both training specifically around the needs of individual learners and importantly whole school approaches to identifying and supporting the different areas of need. Training was being offered virtually and face to face and the number of schools receiving training had been rising since 2019/20.
- 23.7 All work undertaken by the teams was evaluated by parents/carers, young people and schools for individual support work, and by schools/delegates for training. In addition, in May 2022, a survey seeking to understand the views of schools and staff was undertaken to provide insight into the impact of the new model of service delivery. It was completed by 72 respondents, 49 school SENCOs and 23 HINT staff. The results of the survey were detailed within the report, but overall feedback had been very positive.
- 23.8 However, waiting times remained a concern. The growth in capacity within the teams was still not meeting the huge increase in demand seen. Waiting times would continue to be monitored along with trying to understand why there continued to be an increase in demand for services.
- 23.9 Regarding single point of referral for HINT, schools reported that this had streamlined referrals from their perspective, saving time and ensuring pathways were smoother. They had found the referral form straightforward in comparison to others.

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- 23.10 Schools and HINT Staff reported that access to the teams had improved since the paid SLA was removed, enabling support to more children and young people, and to training.
- 23.11 The objectives set in 2020 had been met, and the recommendation was that HINT should continue to work free at the point of delivery in the longer term. Practice would continually be reviewed in order to continue to maintain high standards of service in the face of increasing demand.
- 23.12 It was noted that Northumberland had a unique offer in comparison to neighbouring local authorities, and schools continued to describe high impact of the teams.
- 23.13 Members discussed the specialism which now existed within mainstream schools.
- 23.14 It was noted that there was a slightly different system for support in relation to PVI's and nurseries within schools. There were a number of inclusion consultants that worked with those settings. However, it was suggested that a report on the service in terms of how the current inclusion fund for early years had been spent, the number of referrals into the settings and also some of the outcomes from those referrals be drafted for a future meeting of Schools' Forum.
- 23.15 The improvements made to SEN provision were noted.
- 23.16 However, a point was raised about the recurring issue around SEN as there was always a demand for more funding. There had been improvements made in recent years but there was still not enough money available to meet the needs in school. It was suggested that a strategic look was needed to examine demand, future demand and where the High Needs funding was being spent. This work could also include a deep dive of the Schools Block to ensure all budget and funding streams were being used in the most efficient way to benefit schools.
- 23.17 In response, Members were advised that Northumberland were quite good at managing its budgets including the High Needs Block compared to others who were significantly overspent. A significant piece of work had already taken place around SEN place planning which had forecasted that within the next five to six years an additional 770 places. There was already a group of Headteachers looking at the inclusion aspect, but it was advised that the best use of time and resources could be to arrange a summit to collectively look at the challenges that would be place based for Northumberland at a strategic level including the financial aspects, understanding the decision making and future challenges.
- 23.18 Members were advised that a funding gap tool was being created to help correctly identify income and expenditure around SEN. This was still in the early stages of being developed but a trial had started with a few schools.
- 23.19 It was reported that SEN funding was also there to support staffing. However, the lack of support for staff to be able to support those children was a major issue. Attracting and retaining the right staff to jobs within Northumberland was essential.

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23.30 Schools' Forum agreed that a strategic summit in the new year on the issues raised would be of benefit to all and suggested that a discussion take place outside of the meeting to formulate a plan of action going forward.

RESOLVED that:

(a) the report be noted

(b) the Service Director – Education and Interim DCS meet with the Chair and G. Atkins to discuss arranging a summit with Schools' Forum and Headteachers on the overall strategic challenges faced by Northumberland schools today and in the next few years.

24. USE OF 2021/22 DEDICATED SCHOOLS GRANT (DSG) CARRY FORWARD

24.1 The report provided details of the intended use of the Dedicated Schools Grant (DSG) carry forward from 2021-22 to Schools' Forum members. (A copy of the report has been filed with the signed minutes).

24.2 The report advised that the final position for the 2021-22 financial year was an underspend of £4.032 million, with an underspend across all blocks.

24.3 It was noted that whilst the Authority had the power to transfer a surplus carry forward between blocks, at the present time, it was proposed that the surplus on each block be ring-fenced.

24.4 Discussions had taken place with the relevant Heads of Service to assess the commitments that exist within their own DSG Block for 2022-23, the availability of funding in the current year and future pressures. This had identified where the surplus from 2021-22 could be used to support in-year expenditure and where funds should be set aside for the rising demands in 2023-24 onwards.

24.5 Budget pressures identified for 2022-23 were detailed within the report and Appendix A detailed a list of the commitments for 2022-23.

24.6 Looking ahead it was suggested the balance of the 2021-22 surplus of £2.970 million be retained in the DSG Reserve. It was envisaged that future use of the reserve would be considered by Heads of Service when planning for the 2023-24 budget year and beyond.

24.7 The following upcoming pressures had already been identified for 2023-24 and beyond, including:

- Future pay awards.
- The impact of inflation on contracts and fuel.
- Continued rise in demand for alternative provision, special school places and number of pupils with an EHCP. This links to additional top-up funding and place funding.
- Upcoming school re-organisations across the Berwick and Coquet partnerships. This could also lead to some demands on the schools contingency funding.

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- 24.8 Clarification was sought as to why there was an underspend. In response it was stated that there were a number of factors for the underspend. The issue with the Schools Block was that it was quite rigid which limited what funding could be spent on. There had also been some growth funding set aside which was not needed and the closure of Haltwhistle Middle School Academy had resulted in a refund to the DSG.
- 24.9 Members were advised that the contingency fund and potential reorganisations of the Berwick and Coquet partnerships would be drawn from the delegated funds from maintained schools. The deduction from the DSG in relation to growth and falling roles sat within the Schools Block. The deduction from DSG and falling roles fund would come from both maintained schools and academies.
- 24.10 Reassurance was sought that opportunities were not being missed to get the forecasted surplus money to schools. There was a suggestion that maybe a revisit of the High Needs Block was needed. If there was money, then it was of greater value to schools on the ground to relieve some of the financial pressures being faced.

RESOLVED that the Schools' Forum:

- a. Notes the carry forward to 2023-24 in advance of £2,969,440 from the overall surplus in 2021-22 of £4,031,990 in line with the request attached at Appendix A.
- b. Notes the intention to carry forward the respective DSG blocks (Central Services Schools Early Years, High Needs and Schools Block) on a ringfenced basis into 2022-23 and 2023-24.
- c. Notes the intended use of £1,062,550 in 2022-23 of the carry forward from 2021-22.

25. 2022/23 DSG BUDGET UPDATE

- 25.1 The purpose of the report was to ensure that the Schools' Forum was informed of the current financial position of the Dedicated Schools Grant (DSG) against the Budget for 2022-23. (A copy of the report has been filed with the signed minutes).
- 25.2 The report advised that the budget for the DSG was agreed by Schools' Forum in February 2022 based upon the initial allocation for 2022-23 that was released in December 2021. Since that time there had been two further updated allocations in March 2022 and July 2022.
- 25.3 The table within the report showed the current DSG allocation after recoupment and including the drawdown of £1.063 million from the 2021-22 DSG surplus.
- 25.4 The current forecast showed that all areas of the DSG were underspending with the exception of the High Needs Block. If the transfer from the Schools Block had not taken place, then the overspend would be £1.102 million instead of the £0.586 million currently reporting.

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- 25.5 The forecast was subject to change, particularly for the High Needs Block and Early Years Block.
- 25.6 The High Needs Block overspend was due to a forecasted overspend on top-ups, the Independent Special Schools budget and from the Inclusion Service. There had been an increase in the numbers of learners and a rise in the number of permanently excluded children. There was also the additional pressure of rising fuel costs and support to local transport providers.
- 25.7 It was noted that in comparison to previous years the overall DSG overspend was relatively small. The next report to Forum would provide a much clearer picture of what the costs would be going forward as the forecasts around placement provision should be known.
- 25.8 Regarding the staff posts detailed within the report it was confirmed that they were recruited on fixed term contracts. Work was taking place to examine how to retain the staff and skills they had obtained. It was reported that they had been delivering extremely valuable work and it would be regrettable if they could not be protected, or funding secured to retain them as recruitment and retention of staff was a real issue across the local authority and schools.
- 25.9 It was brought to members' attention that in terms of the High Needs Block there was a greater proportion being spent in schools which might reassure some that money was being distributed to try and meet need. Also, although there was an underspend in the additional SEN notional funding there was still a forecasted distribution of around £340,000 still to be made compared to £100,000 distributed previously. It was hoped that this figure would further increase in the Autumn term.

RESOLVED that the financial performance to the end of September 2022 and the projected year end position on the DSG at the present time be noted.

26. NATIONAL FUNDING FORMULA AND 2023/24 SCHOOL FUNDING CONSULTATION

- 26.1 Members were provided with further additional information in respect of the continuing implementation of the National Funding Formula, the Dedicated Schools Grant (DSG) and associated 2023/24 Schools Funding information. This included formal consultation with Schools' Forum in relation to funding for 2023/24. (A copy of the report has been filed with the signed minutes).
- 26.2 Forum Members were provided with a short presentation containing information of what was discussed at the recent High Needs Committee from the ESFA regarding the changes in school funding and local funding formulae 2023 to 2024.
- 26.3 The presentation highlighted:
- the increases in the level of funding and the rolling in of the schools supplementary grant.

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- tightening and mirroring. Northumberland was not completely mirroring at the minute as the mobility factor was outside of the 2½ % threshold. However, it was hoped that this would be addressed this year.
- Minimum per pupil amount (MPPLs).
- Mobility. Again, mobility, was an issue for Northumberland, it was intended to move in line with the national funding formula value should funding permit.
- Sparsity.
- Split Site. This affected four schools within Northumberland. The Local Authority was working closely with those schools affected.
- Exceptional Circumstances (premises).
- Minimum funding guarantee (MFG) and the need to formally consult with schools and Schools' Forum.
- Capping and scaling and the capping of 50% of any gains over and above 13%.
- Notional SEN budget.

26.4 The Schools' Forum was reminded that this was a formal consultation report for consideration.

26.5 It was reiterated that previously there had been no firm fixed target date, but there had now been an expectation that local authorities move to the direct formula within the next five years or by 2027/28.

26.6 The 0.5% level of increase to Minimum Per Pupil Funding (MPPF) had caused some discussions, both in Formula Funding Group and the previous Schools' Forum. It was anticipated that this lower level could reduce the funding distributed via this by £0.893 million, from £2.451 to £1.558 million potentially impacting 22 schools within Northumberland, based on last year's data.

26.7 Regarding the transfer from Schools Block. As reported to Schools' Forum in July, because of the exceptional circumstances caused by covid, overall balances of £4.032 million were reported, including £1.804 million for the High Needs Block. However future pressures for the area were also highlighted within the report including rising expenditure for Alternative Provision, increases in Education Health and Care Plans, the key indicator of costs for SEND, as well as continuing to offer NIES services free at the point of need.

26.8 As reported previously, there was a continuing underspending across the Schools, Early Years and Central Services Blocks, but also a reported overspend in relation to High Needs. However, this figure was before the other additional pressures identified in 2023/24 were added including the opening of a new Free School in Blyth.

26.9 It was the intention to continue to deliver the Northumberland Inclusive Education Service free. Further information will be provided to the January and February meetings in relation to this, but the agreement of Schools Forum was again sought to the potential transfer of 0.25%, or approximately £546,000 from the Schools Block to the High Needs Block, based on the provisional 2023/24 Schools Block figure.

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- 26.10 It was reported that the Formula Funding Committee requested that additional information be provided to the Schools' Forum in relation to the potential impact of the MFG levels. Previously Northumberland made the decision to set the MFG at the maximum level of 2%, but the ESFA had limited the level of MFG to between 0% and 0.5%. Setting the MFG at either 0% or 0.5% therefore only made a net difference of £32,382, though this was subject to change when the October 2022 data was available. There was therefore potentially comparatively little variation, but in line with previous Schools' Forum decisions it was felt that subject to the resources available the MFG should be set at 0.5% in order to maximise the number of schools supported.
- 26.11 As previously reported, the Central Services Block funding continued to fall, due largely to the continuing reduction in the historic element.
- 26.12 No information for Northumberland was available yet in relation to Early Years funding, in line with previous years. It was envisaged that details of the funding for 2023/24 would be received in December together with the rest of the DSG information.
- 26.13 It was noted that the Schools' Forum had overseen a relatively smooth transition towards NFF rates. With the exception of the mobility factor, only introduced in 2022/23, other values were in line with NFF rates.
- 26.14 It was reported that while most of the issues covered were likely to have little impact given how close it was to the NFF, one area to consider further was the proposed changes to the split site factor. It was a proposal that the split site element be based on a 60% of the lump sum. It was proposed to move this to 60% for 2023/24. This would not have any financial implications for other schools not in receipt of split site funding.
- 26.15 Following any comments received today, the intention was also to consult with schools ahead of the final budget setting report to Cabinet. The consultation was proposed to run from Tuesday, 22 November to Monday, 12 December. The results of the consultation and final recommendations to Cabinet would be reported back to the next meeting of Schools' Forum.
- 26.16 It was noted that because of the short timescales, delegated powers were sought for the Interim Director of Children's Services and Service Director –Education to set the final figures, in line with the principles and illustrative figures outlined in the report. As reflected in the recommendations the Cabinet report would seek delegated powers to agree the final values, this would then be reported to the Schools' Forum meeting on 18 January 2023 prior to submission to the ESFA by 20 January 2023.
- 26.17 It was queried whether there was any data available on a school-by-school basis which detailed the additional increases in costs including the pay award increase and fuel costs. It was confirmed that this could be produced probably by each phase rather than school. It was also suggested that the data include the impact of food inflation particularly for first and primary schools. It was noted that there was a fixed rate in relation to free school meals but due to increasing prices this was

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causing additional pressures on school budgets. It was reported that this could be produced for the next meeting of the Schools' Forum and included in the report to Cabinet to show the wider implications faced by schools when trying to meet demand with potentially reduced incomes.

- 26.18 Regarding PVI's it was reported that recruitment remained very difficult and impacted on the number of children that providers could receive. Because of this a number of providers had looked into reducing the number of funded places. Also, the length of time taking before PVI's received funding for a child with additional needs was also highlighted as an issue.
- 26.19 For schools who also ran a nursery the same issues were being raised. Due to the now agreed pay award many were finding their budgets had moved straight into deficit which was of great concern.
- 26.20 Recruitment, retention and pay increases within the private sector was also impacting on schools. Many retail sector jobs paid more than school support workers resulting in it becoming increasingly difficult to compete for staff.
- 26.21 It was reported that there was discussion taking place about potentially altering school ratios to help try and manage budgets. However, this could also not only benefit schools but hindering them. The added complexity was the Early Years Block allocation was not known yet which did not help with future planning.

RESOLVED that Schools' Forum:

- a. Agree to a transfer of up to 0.25% (approximately £546,000) from the Schools Block to the High Needs Block for 2023/24.
- b. Agree that the funding values for 2023/24 be set in line with the principles outlined in the report; and agree for these to be the basis for the wider consultation with schools.
- c. Note the delegation of final decisions on the values to the Interim Director of Children's Services, in consultation with the lead member for Children's Services once final funding becomes known in December 2022, in order to enable the required Cabinet report to be prepared and submitted to the 10 January 2023 meeting, and the submission of the necessary return to the ESFA by 20 January 2023.
- d. Receive a further report to the Schools' Forum meeting on 18 January 2023 on the outcome of the consultation with schools and final funding values to be used for 2023/24.

27. 2022 WORK PROGRAMME AND MEETING DATES

- 27.1 The schedule of dates had been circulated with the agenda papers and a copy filed with the signed minutes a copy of which has been filed with the signed minutes).

RESOLVED that the information be noted.

28. DATE OF NEXT MEETING

Ch.'s Initials.....

RESOLVED that the next meeting would take place on Wednesday, 18 January 2023 at 9:30 a.m.

CHAIR_____

DATE_____

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