

NORTHUMBERLAND COUNTY COUNCIL

SCHOOLS' FORUM

At a meeting of the Schools' Forum on Wednesday, 19 July 2023 at 9.30 a.m. at County Hall, Morpeth.

PRESENT

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

Headteacher Representatives

A. Brown, Corbridge Middle School

Governor Representatives

B. Mansfield, Newbrough CE Primary
School

K. Faulkner, Collingwood School

B. Watson, St Robert's RC First
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

Pupil Referral Unit Representative – R. Carr

19-19 Provider of Education Representative – W. Stephenson

Trades Union Representative – Vacant Post

Councillor R. Wearmouth (observer)

OFFICERS IN ATTENDANCE

A. Kingham

Executive Director - Children, Young People and
Education

S. Aviston

Head of School Organisation and Resources

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M. Finlay	Head of Inclusive Education Services
B. Parvin	Education and Skills Business Manager
C. Ponting	Senior Manager - Schools HR
A. Russell	Principal Accountant – Non-Team Leader
D. Street	Deputy Director of Education
A. Todd	Democratic Services Officer

1 member of the press was also in attendance.

1. MEMBERSHIP AND MEMBERSHIP UPDATE

- 1.1 Members were notified that an expression of interest had been received from Barry Reed to join the Schools' Forum as a Special Academies representative. The Forum agreed to this appointment and looked forward to welcoming Barry at their next meeting.
- 1.2 It was noted that Barbara Mansfield had agreed to remain on the Forum following Newbrough Church of England Primary School's change in status from a maintained school to an academy. This would result in Barbara becoming an Academy Governor representative.
- 1.3 The Chair welcomed Adele Brown to her first meeting of the Schools' Forum as a middle school representative.
- 1.4 As this was Colin Pearson's last meeting before retiring from the Schools' Forum nominations for a new chair had taken place. Following expressions of interest, it was agreed Alan Hardie take up the chairmanship of the Schools' Forum starting from the September meeting. Members congratulated Alan on his appointment.
- 1.5 It was suggested that the September meeting would be a suitable time to re-examine the terms of reference of the Schools' Forum to ensure they were still fit for purpose.

2. APOLOGIES FOR ABSENCE

- 2.1 Apologies for absence were received from M. Deane-Hall, A. Mead, N. Rodgers, N. Threlfall, K. Dickinson and Councillor G. Renner-Thompson.

3. MINUTES AND MATTERS ARISING

RESOLVED that the minutes of the meeting of the Schools' Forum held on Wednesday, 15 February 2023, as circulated, be confirmed as a true record and signed by the Chair.

4. COMMUNICATIONS

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Members received the draft minutes of the HN Committee of the 29 March 2023. (A copy of the HN Committee draft minutes has been filed with the signed minutes).

RESOLVED that the draft minutes of the High Needs Committee be noted.

5. SUPPLEMENTARY GRANT FOR EARLY YEARS FUNDING RATE INCREASE 2023/24

- 5.1 The report sought to inform Schools' Forum of the additional funding made available for the period September 2023 to March 2024, and the associated funding rates. (A copy of the report has been filed with the signed minutes).
- 5.2 It was noted that the DfE had now provided further details on the EY DSG methodology and hourly funding rates from September 2023 for each local authority. Additional information on funding rates could be found using the link provided with in report.
- 5.3 For Northumberland it would result in:
- a 6.8 % increase on the 3- and 4-year-old rate equating to an additional £0.33 per hour. This would be passed on directly to providers meaning an hourly rate of £4.91 from September.
 - a 29.1% increase on the two-year-olds rate equating to an additional £1.64 per hour. This would be passed on directly to providers meaning an hourly rate of £7.27 from September.
- 5.4 Discussions took place regarding how there was a discrepancy between the provision available for two years olds compared to three and four year olds for working parents.
- 5.5 It was felt that funding was not in line with increasing costs and growing numbers of children were needing access to specialist support services.
- 5.6 The higher demand for specialised services in early years was discussed.
- 5.7 It was reported that Northumberland was nationally in the top 5 for take up of two year old provision. However, it was reported that children from less disadvantaged backgrounds were not taking up the early years provision.
- 5.8 It was noted that there was evidence to suggest that those children who did take up the early years provision were better prepared for school.
- 5.9 Members were advised that an officer working group had been established to examine, develop and support transition to school including investment, SEND model and early years passport.

RESOLVED the report be noted.

6. DEDICATED SCHOOLS GRANT (DSG) OUTTURN 2022/23

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- 6.1 The report provided details of the Dedicated Schools Grant (DSG) outturn position for 2022/23 to Schools' Forum members, together with the implications of the outturn and upcoming pressures. (A copy of the report has been filed with the signed minutes).
- 6.2 The key points within the report were highlighted.
- 6.3 It was noted that the Schools' Forum meeting in January 2022 set the budgets for each block within the DSG with details for the Early Years and the High Needs blocks being agreed at the meeting in February 2022. The DSG allocation was then updated during the year by the DfE to consider school academy conversions, changes to high needs place funding and early years census data. The budget reflects the latest DSG allocation from the DfE issued in March 2023.
- 6.4 The Early Years block was funded in arrears based upon census returns with a final settlement for Spring term 2023 due in July 2023. In line with the conditions of the grant, the service had estimated the final settlement for 2022-23 and this was reflected in the 2022-23 budget. If the actual settlement was to differ from the estimate this would impact on the 2023-24 budget position.
- 6.5 The overall DSG reserve of surplus balances carried forward from 2021-22 was £4.032 million. £1.063 million was withdrawn from the reserve into the budget position for 2022-23, leaving a balance of £2.969 million in the DSG reserve to meet pressures in future years.
- 6.6 The final position for the 2022/23 financial year was an underspend of £1.532 million, with underspends across each block:
- Central Schools Block underspend of £0.181 million
 - Early Years Block underspend of £0.421 million
 - High Needs Block underspend of £0.205 million
 - Schools Block underspend of £0.725 million
- 6.7 It was noted that reserves had risen slightly across the year, but this could be attributed to factors that were not recurrent and therefore unlikely to occur in future years:
- staff vacancies
 - surplus on historic commitments funding
 - schools contingency sum being unspent in 2022/23
- 6.8 Whilst the High Needs block had underspent by £0.205 million it should be noted that this included the budget of £0.516 million which was transferred from the Schools Block and £0.132 million from the DSG reserve from the previous year. Without this additional funding the High Needs Block would have resulted in an overspend of £0.443 million.
- 6.9 The budgetary pressures that had been building since 2021-22 in relation to demand for SEN places and top-ups (both in-house and the independent sector) and Alternative Provision were predicted to increase significantly for 2023-24. The future rise in numbers and the impact of increasing inflation had indicated that the full High

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Needs block reserve of £1.876 million would be required to meet cost pressures for the coming financial year.

- 6.10 It was the intention to ring-fence the year end position on each block this year to ensure that funds carried forward could be utilised effectively and to provide services with additional resource to meet the emerging priorities within the specific areas of the Dedicated School Grant.
- 6.11 Schools' Forum was asked to support the proposal to carry forward the budget surplus of £81,280.08 to 2023/24 for the use of the English as an Additional Language (EAL) team.
- 6.12 Schools' Forum was also asked to support the proposal to carry forward the budget surplus of £130,015 as at the 31 March 2023 to 2023/24, in relation to the Trade Union Facility Time service.
- 6.13 Members discussed SEN top ups and the increase in demand being seen in schools. The banding associated with funding had not been altered in many years although the complexity and number of SEN children continued to increase with schools having to bear the brunt of this. The average top up had now increased to £900. Schools were facing more and more challenges and were financially struggling. It was hoped that banding would be one of the areas that could possibly be increased to help schools.
- 6.14 Members acknowledged that the high needs block continued to be one of the biggest challenges when managing budgets.
- 6.15 It was stated that everyone was aware of the current struggles regarding SEN provision and the predicted worsening year on year. Therefore, contingency planning for the future was essential otherwise demand would not be met going forward.
- 6.16 The frustration felt by schools regarding having to subsidise SEN support from their own budgets. Schools felt that they should not be penalised for managing to keep their budgets balanced if SEN provision was inadequate to meet need.
- 6.17 It was suggested that the High Needs Committee could examine the banding criteria and the impact this had on schools. Schools felt that there was inadequate funding and a re-examination of the reserves and carry forward policies in the DSG could be needed. Schools Forum were reminded of the decision for 2022/23 to target additional HN funding to this most inclusive school using the Notional SEN calculations, but this meant funding was distributed at a school level not via individual bandings. Similarly special schools had received additional funding through the introduction of a lump sum rather than specific banding increases.
- 6.18 The need to continue to lobby at a national level to raise awareness of the funding issues, particularly SEN was emphasised. Assurance was given to Schools' Forum on the amount of lobbying that continues to be carried out on their behalf. The voice of Schools' Forum was strong and continued to be a valuable source of engagement used to ensure the views and concerns of schools were passed to central government.

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6.19 Members discussed alternative provision and associated transport costs. It was thought that if there was a way to provide more internal provision a reduction would be made seen in travel costs and pupils could be educated more locally. Members were informed that officers were reviewing the home to school transport model. There was already an Inclusion Panel established and the framework for alternative provision was out to tender. The Councils overall aim was to always to meet a child's needs as close to home as possible.

RESOLVED that School's Forum:

- (a) Approve the carry forward of the 2022/23 Trade Union Facility surplus of £130,016 in line with the request attached at Appendix A.
- b) Approve the carry forward of the 2022/23 English as an Additional Language (EAL) surplus of £73,717 in line with the report attached at Appendix A
- c) Note the intention to carry forward the respective DSG blocks (Central Services Schools) Early Years, High Needs and Schools Block) on a ringfenced basis into 2023/24.

7. MAINTAINED SCHOOL BALANCES AS AT 31 MARCH 2023

- 7.1 The report informed Schools' Forum of the position regarding Maintained School Balances as at 31 March 2023. (A copy of the report has been filed with the signed minutes).
- 7.2 It was reported that the original aggregated balances figure brought forward into 2022/23 was £8.967m (as at 1 April 2022), as reported to Schools Forum in July 2022. This represented 108 schools. However, this figure has been reduced by £0.285m to reflect the school that academised during the period. The adjusted balances therefore reflect those 105 schools reflected in both the 2022/23 opening and closing balances.
- 7.3 It was noted that overall balances have improved across all phases, in simple terms income exceeded expenditure during 2021/22, and in general schools had managed their finances effectively during the year. This was against a backdrop of significant rises in pay and price inflation costs, which has had a significant impact on all schools.
- 7.4 It was reiterated that Schools' Forum no longer received a report detailing individual school balances, but it was anticipated that individual school balances for 2022/23 would be published via the Schools Financial Benchmarking service in late 2023.
- 7.5 Members were advised that a revised appendix A of the report would be circulated following the meeting.

RESOLVED that the report be noted.

8. SCHEME FOR FINANCING MAINTAINED SCHOOLS 2023/24

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- 8.1 The purpose of the report was to review and approve the revised Scheme for Financing Maintained Schools for the period commencing 1 September 2023 (a copy of which has been filed with the signed minutes).
- 8.2 A copy of the proposed Scheme for the academic year 2023/24 had been circulated with the report and proposed changes highlighted in yellow, with the exception of those schools which the Scheme was no longer applicable due to academisation shown as a strikethrough.
- 8.3 It was noted that there were no major changes proposed by the ESFA to the Scheme. NCC had proposed changes to introduce a “de minimis” figure cash figure of £50,000 in relation to maximum uncommitted balances figure, in order to provide greater certainty to very small schools re this.
RESOLVED that Schools’ Forum approve the attached draft Scheme for Financing Maintained schools.

9. 2023/24 WORK PROGRAMME AND MEETING DATES

The schedule of dates had been circulated with the agenda papers and a copy filed with the signed minutes.

RESOLVED that the information be noted.

10. ANY OTHER BUSINESS

10.1 National Funding Formula Values 24/25

It was noted that the funding formula tables for 2024/25 were available online to view. A report on this subject would be prepared for the next meeting of Schools’ Forum.

10.2 Pay awards

It was reported that there was presently no further detail on this issue.

RESOLVED that the information be noted.

11. DATE OF NEXT MEETING

RESOLVED that the next scheduled meeting of the Schools’ Forum will be Wednesday, 27 September 2023. Meetings would continue to be held virtually apart from the July meeting which would be in person.

A small presentation took place following the closure of the meeting to thank Colin Pearson for his exemplary leadership and dedication to the work of the Schools’ Forum over the years. Members wished him well in his retirement.

Ch.’s Initials.....

CHAIR _____

DATE _____

Ch.'s Initials.....