



# Northumberland

## County Council

**Your ref:**

**Our ref:** AT

**Enquiries to:** Andrea Todd

**Email:** Andrea.Todd@northumberland.gov.uk

**Tel direct:** 01670 622606

**Date:** 11 January 2024

Dear Sir or Madam,

A virtual meeting of the **SCHOOLS' FORUM** will be held on **WEDNESDAY, 17 JANUARY 2024** at **9.30 AM**. You will be sent a link to the meeting and I would be grateful if you could accept or decline the invitation accordingly.

I remind you that if you are unable to attend, you should arrange for an appropriate substitute to attend on your behalf. Alternatively forward any written representations to me in advance.

In the current situation can I ask that Forum members read all papers prior to the meeting and forward any questions or contributions to me in advance of the meeting, however, we will do everything possible to take comments at the meeting too.

Yours faithfully

Andrea Todd  
Clerk to the Forum

**To: Members of the Schools' Forum**

## AGENDA

It is expected that the matters included in this part of the agenda will be dealt with in public.

		<b>Decision/Consultation/ Information/Action</b>
1.	<b>MEMBERSHIP AND MEMBERSHIP UPDATE</b>	<b>Information</b>
2.	<b>APOLOGIES FOR ABSENCE</b>	<b>Information</b>
3.	<b>DISCLOSURES OF INTERESTS (IF ANY)</b>	<b>Information</b>
4.	<b>MINUTES AND MATTERS ARISING (Pages 1 - 8)</b> Minutes of the meeting of the Schools' Forum held on Wednesday, 22 November 2023, as circulated, to be confirmed as a true record, and signed by the Chair.	<b>Action</b>
5.	<b>COMMUNICATION</b>	<b>Information</b>
6.	<b>SETTING THE 2024/25 DEDICATED SCHOOLS GRANT (Pages 9 - 20)</b>	<b>Information / Consultation / Decision</b>
7.	<b>2024 WORK PROGRAMME AND MEETING DATES (Pages 21 - 22)</b>	<b>Information</b>
8.	<b>ANY OTHER BUSINESS</b>	<b>Information / Action</b>
9.	<b>DATE OF NEXT MEETING</b> The next scheduled meeting of the Schools' Forum is <b>Wednesday, 14 February 2024.</b>	<b>Information</b>

## NORTHUMBERLAND COUNTY COUNCIL

### SCHOOLS' FORUM

At a meeting of the Schools' Forum on Wednesday, 22 November 2023 at 9.30 a.m. held virtually.

#### PRESENT

Alan Hardie, NCEA  
(Chair, in the Chair)

#### Headteacher Representatives

M. Deane-Hall, Wooler and Glendale  
Middle School

A. Mead, Hillcrest School

#### Governor Representatives

B. Mansfield, Newbrough CE Primary  
School

G. Wilkins, St Wilfrid's RC Primary  
School

B. Watson, St Robert's RC First  
School

#### Academies Representatives

G Atkins, Hadrian Learning Trust

B. Reed, Gilbert Ward Academy

**Roman Catholic Diocese – Vacant Post**

**Church of England Diocese –**

**Pupil Referral Unit Representative – R. Carr**

**19-19 Provider of Education Representative – W. Stephenson**

**Trades Union Representative – Vacant Post**

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## OFFICERS IN ATTENDANCE

S. Aviston	Head of School Organisation and Resources
M. Finlay	Head of Inclusive Education Services
A. Kingham	Executive Director - Children, Young People and Education
B. Parvin	Education and Skills Business Manager
A. Russell	Principal Accountant – Non-Team Leader
D. Street	Director of Education, SEND and Skills
A. Todd	Democratic Services Officer
L. Walker	Media Communication Officer

### 23. MEMBERSHIP AND MEMBERSHIP DETAIL

Nothing to note.

### 24. APOLOGIES

- 24.1 Apologies were received from N. Rodgers, A. Brown, N. Threlfall, K. Dickinson, Councillor Renner-Thompson and Councillor Wearmouth.

### 25. MINUTES AND MATTERS ARISING

**RESOLVED** that the minutes of the meeting of the Schools' Forum held on Wednesday, 27 September 2023, as circulated, be confirmed as a true record and signed by the Chair subject to the following amendment to item no.12.1 'It was acknowledged that **Graham** Wilkins would remain...'.

Members were reminded to actively promoted the existing vacancies within Schools' Forum to interested parties through their networks.

### 26. COMMUNICATIONS: HN Committee 25 October 2023 Draft Minutes

- 26.1 Members' attention was drawn to the main discussion points that were discussed at the High Needs Committee on 25 October 2023 (a copy of the draft minutes had been filed with the signed minutes).
- 26.2 The Chair of the HN Committee reported that all members found the meeting informative and thanked officers for the information presented.

**RESOLVED** that the information be noted.

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## 27. FINANCIAL MONITORING 2023/24

- 27.1 A. Russell, Principal Accountant presented the report which sought to ensure that the Schools' Forum was informed of the current financial position of the Dedicated Schools Grant (DSG) against the Budget for 2023-24. (A copy of the report has been filed with the signed minutes).
- 27.2 Members were advised that the forecast position overall was a £0.550 million overspend. The report detailed the projected position at the end of September 2023 within each service area. The main factors contributing to the overall position were reported to Schools' Forum as follows:
- In the Central Schools Block there was a forecasted underspend of £0.050 million on the cost of independent school placements for young people without an EHCP.
  - The Early Years Block had a forecasted underspend of £0.022 million on the Early Years Central Team due to a staff vacancy within the team.
  - There was a forecasted overspend of £0.791 million in the High Needs Block. Factors including pupil transport, the increase of permanent and fixed term exclusions and the cost of independent special school placements were discussed.
  - There was a forecasted underspend of £0.149 million on the Trade Union Facility time budget within the Schools Block.
- 27.3 It was noted that the gap between funding levels and expenditure had widened significantly during 2023-24 causing additional pressure on the High Needs Block which was not sustainable on a long term basis.
- 27.4 The current financial forecast demonstrated the extreme pressure the High Needs Block was facing and the potential impact on the DSG reserve.
- 27.5 A. Kingham, Executive Director - Children, Young People and Education advised that there continued to be significant pressures within High Needs. The HN Committee were aware of the issues and would continue to monitor. She stated that Northumberland was in a better position than other authorities, but it would be a very challenging time ahead.
- 27.6 D. Street, Director of Education, SEND and Skills spoke about pupil placement, formula values and the funding available if learners stayed within a mainstream compared to a specialist setting.

**RESOLVED** that the financial performance to the end of September 2023 and the projected year end position on the DSG at the present time.

## 28. SEN UPDATE

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- 28.1 M. Finlay, Head of SEND presented to Schools' Forum an update on SEND for the academic year 2022-23, including challenges faced and action taken to date or planned. (A copy of the report has been filed with the signed minutes).
- 28.2 It was reported that since the introduction of the 'free on demand' delivery model by the SEND Service in September 2020, referrals had continued to increase year on year. In order to ensure demand could be met without requiring increased funding, the service had undergone delivery transformation throughout 2022-24. The SEND Service were confident that these models were sustainable for projected demand over the next two academic years (to August 2025). Increases in EHCP numbers witnessed locally, and nationally, continued to put pressure on the High Needs Block through top up and associated demand for special school places.
- 28.3 It was noted that over the last four years there had been a 73% increase in the number of EHC plans since 2020. The case workers currently had roughly 200% of the average NE caseload, and this impacted on other services such as Educational Psychology. This had also led to a decline in the number of EHCP's issued within the 20 week limit.
- 28.4 G. Atkins thanked M. Finlay for all the work he and his team had achieved for the young people who had special educational needs in the county. He suggested that the local authority and schools work more closely together on SEN by pooling support, resources and expertise on all matters.
- 28.5 The Chair also praised M. Finlay and team for their dedication and commitment to SEN in what was a very demanding time.
- 28.6 G. Atkins queried if any modelling had been done to map out future costs, implications for budgets and how the system could be sustained if numbers of young people with SEND continued to rise year on year. In response it was reported that forecast had been carried out, so the SEND service knew potential numbers coming through. However, the population was changing. Modelling work had been carried out on short term capacity, but it was believed that in the longer term a different approach would be needed. Mental health was one of the leading factors within the presenting needs of young people. SEN place planning had taken place and the authority was in the top five for first choices when applying for a primary secondary school place. But more was still needed. The decisions taken needed to be of sound testing and evidence based. Each case was unique, and it was about meeting a young persons need not just now but in the future.
- 28.7 M. Deane-Hall spoke about the High Needs deficit and the sustainability of SEND services in the future. He sought assurance that the concerns of the Schools' Forum, HN Committee and the local authority regarding the rise in SEN and funding available were being shared with colleagues both regionally and nationally. In response it was confirmed that at every opportunity the concerns of colleagues were raised with local counter parts, politicians, Regional Directors from the Department of Education, and the local authority had also hosted visits

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from education officials. These concerns were also championed through the F40 Group to central government.

28.8 Members reiterated the comments made about the transformation of the SEND Services Team and the valuable support being provided to schools by M. Finlay and staff.

28.9 D. Street, Director of Education, SEND and Skills shared a powerpoint presentation with the Schools' Forum that he had also delivered to the recent meeting of the HN Committee (a copy of the powerpoint slides have been filed with the signed minutes). The presentation covered the following issues:

- HNB and Capacity Summary.
- Budget 23/24 breakdown.
- DfE Safety Value/Better Value Agreements.
- Reduce growth/cut EHCPs.
  - Strengthen provision at SEND support.
  - Lower expectation of EHCP for lower level needs and younger learners.
  - Reduce the financial benefits of EHCP status.
- Reduce the growth/cut top up values.
  - Remodel the top up system.
  - Review whole school balances.
  - Review EHCP's provision sections.
- Reduce demand/cut specialist placements.
  - Develop further parental confidence to stay in the mainstream schools.
  - Develop further inclusive cultures and expectations in mainstream schools.
  - Develop further specialist training and support in mainstream schools.
  - Further reduce out of county placements.
  - Develop more lower cost provisions.
  - Develop gateway control strategies.
- Increase income/funding.
  - Transfer more from other blocks.
  - Lobby central government.
  - External funding streams.
- Consultation.
  - Consult with schools to seek their views.

28.10 B. Reed commented on some of the good practices already in place in specialist placements and welcomed the proposals suggested within the reduce demand slide of the powerpoint presentation. He felt that if colleagues in mainstream schools worked together and supported one another this would lead to more parental confidence and demonstrate the specialist expertise available in mainstream schools.

28.11 It was noted that work was taking place to find better ways to communicate with the public. This would help publicise positive examples of SEN support and promote what was available throughout the county.

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- 28.12 G. Atkins, commented on how challenging it was for schools particularly as the levels of SEN continued to rise. He felt a better solution was needed to meet present and future demand.
- 28.13 A. Mead commented on the complexity of SEN now being seen within schools which had previously not been. Schools were struggling with demand with violence towards staff also on the increase.
- 28.14 The Chair commented that current funding for SEN was not adequate. It was important to forecast and prepare for future demand, particularly in relation to top up funding linked to EHCP's. He hoped that schools would respond to the consultation ahead of the final budget setting report to Cabinet as more informed decision could be made if they did so.

**RESOLVED** that Schools' Forum:

- a) Considers the implication of information presented in relation to relevant financial reports
- b) Makes comment on data and activity detailed within it.

## **29. NATIONAL FUNDING FORMULA AND SCHOOL FUNDING CONSULTATION**

- 29.1 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 2024/25 Schools Funding information. This included formal consultation with Schools Forum in relation to funding for 2024/25. (A copy of the report has been filed with the signed minutes).
- 29.2 B. Parvin drew members' attention to the main points of the report.
- 29.3 It was reported that the provisional 2024/25 allocations based on October 2022 data were detailed within the report. It was noted that as in previous years, the figures would be updated with reference to the October 2023 School Census data when the final figures were released in late December.
- 29.4 As discussed during this meeting and at the HN Committee there was a projected year end deficit on the High Needs Block. Therefore, Schools' Forum was requested to support a 0.5% transfer from the Schools' Block to the High Needs Block for 2024/25.
- 29.5 In relation to the disapplication request in respect of James Calvert Spence College Schools' Forum was asked to support the submission based on the reasoning detailed within the report. B Parvin also reported that subsequent to the report being circulated, all 6 schools involved and returned written agreement to the proposals.

**RESOLVED** that Schools' Forum:

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- a) Agree to a transfer of up to 0.5% (approximately £1.148 million) from the Schools Block to the High Needs Block for 2024/25.
- b) Agree that the funding values for 2024/25 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) Support the disapplication request arising from the requirements of the Coquet schools in relation to their reorganisation with effect from September 2024.
- d) Note the delegation of final decisions on the values to the Executive Director of Children’s Services, in consultation with the lead member for Children’s Services once final funding becomes known in December 2023, in order to enable the required Cabinet report to be prepared and submitted to the 16 January 2024 meeting, and the submission of the necessary return to the ESFA by 22 January 2024.
- e) Receive a further report to the Schools Forum meeting on 17 January 2024 on the outcome of the consultation with schools and final funding values to be used for 2024/25.

**30. 2023/24 WORK PROGRAMME AND MEETING DATES**

30.1 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.

**31. DATE OF NEXT MEETING**

**RESOLVED** that the next scheduled meeting of the Schools’ Forum will be Wednesday, 17 January 2024.

**CHAIR** \_\_\_\_\_

**DATE** \_\_\_\_\_

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## Northumberland County Council

### Wellbeing and Community Health

#### Agenda Item 6

### SCHOOLS FORUM

17 January 2024

### Setting the Dedicated Schools Grant (DSG) 2024/25

#### 1. Purpose of the Report

To inform Schools Forum of the DSG settlement for 2024/25, as provided by the Education and Skills Funding Agency (ESFA) on 19 December 2023, and the proposed formula values for the allocation of funds to Schools for 2024/25.

#### 2. Recommendations

##### 2.1 Schools Forum is recommended to:

- note this report and the information provided in respect of the various elements of the 2024/25 Dedicated Schools Grant; and
- note, where appropriate, the various specific budgets within the individual elements of the DSG will be presented to the 14 February 2024 meeting.

##### 2.2 Members of the Schools Forum representing maintained mainstream schools agree on a phase by phase basis to the de-delegation in respect of the services listed above for 2024/25 using the per unit values, and estimated overall values as set out below.

#### 3. Background

Schools Forum has previously received reports outlining developments in relation to the National Funding Formula (NFF). The November 2023 report outlined the position to date, confirmed Northumberland's position as a local authority that now "mirrors the NFF in all factors".

A transfer of up to 0.5% from the School Block to the High Needs Block was agreed, and it was noted that final decisions were delegated to the Executive Director of Children's Services once the final figures were received in December.

The latest Schools Forum was held on 17 November 2023, the same date of the Chancellor's Autumn Statement but unlike in 2022, there was no additional funding being made available to schools. The Mainstream

Schools Additional Grant (MSAG) funding paid in 2023/24 has been consolidated into the DSG for 2024/25.

Subsequently to the last Schools Forum meeting, the 2024/25 DSG figures were received from the ESFA on 19 December 2023. Our 2024/25 basic Schools Block DSG Grant figure is £229,709,652, some £3,231,921 (1.43%) higher than the equivalent 2023/24 figure of £226,477,731.

Northumberland's total 2024/25 DSG allocation is £316,573,869, (£299,843,517 in 23/24) before any recoupment or deductions for academies, or any High Needs Adjustments.

It should be remembered that when making year on year comparisons, appropriate adjustments need to be made in relation to the Additional Grant received in 2023/24. Summary figures are shown in the table below, with details at **Annex 1**.

<b>DSG Block</b>	<b>2023/24 Baseline</b>	<b>2024/25 Allocations</b>	<b>£</b>	<b>%</b>
<b>Schools Block</b>	£226,477,731	£229,709,652	£3,231,921	1.43%
<b>High Needs Block – (Pre Deductions)</b>	51,939,682	54,413,457	£2,473,775	4.76%
<b>Central School Services Block</b>	£2,268,990	£2,157,405	<b>-£111,585</b>	-4.92%
<b>Early Years Block</b>	£19,157,114	£30,293,355	£11,136,241	58.13%
<b>TOTAL</b>	£299,843,517	£316,573,869	£16,730,352	5.58%

Other influences on the 2024/25 Schools Block allocated figures are:

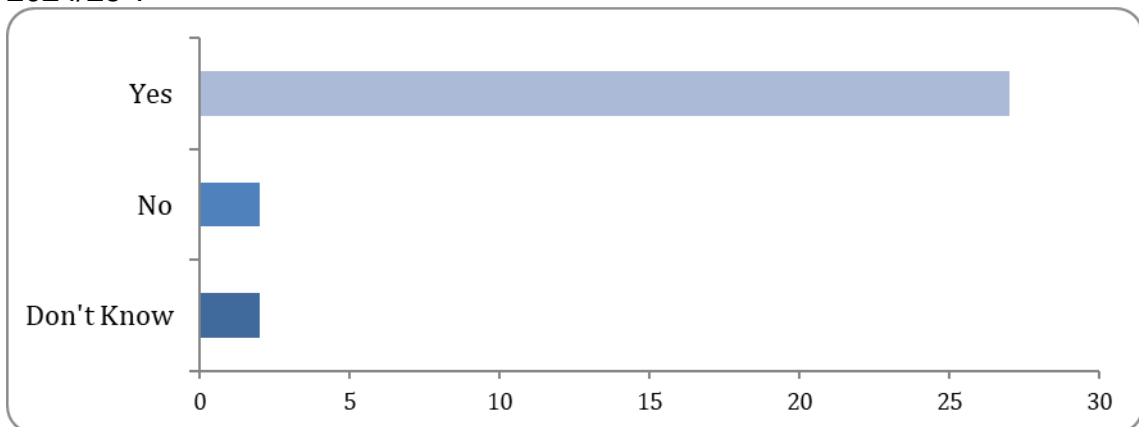
- A continuing fall in the overall number of pupils, down 253 (0.6%) from 38,808 to 38,555; Using the primary minimum per pupil level of £4,610 this equates to a loss of £1,166,330 in funding to Northumberland's schools.
- A continuing shift in pupils from primary (down 476) to secondary (up 223) where there are higher levels of basic "per pupil" funding; and
- Further increases in deprivation funding due primarily to a 3.9% increase in students attracting free school meal funding, broadly in line with the latest national figures available.

The DSG remains as a ring-fenced grant subject to formal grant conditions. As in 2023/24, the DSG is split into four blocks and each block will be determined by a separate national funding formula. Further information is provided on each element in the subsequent sections of the report below.

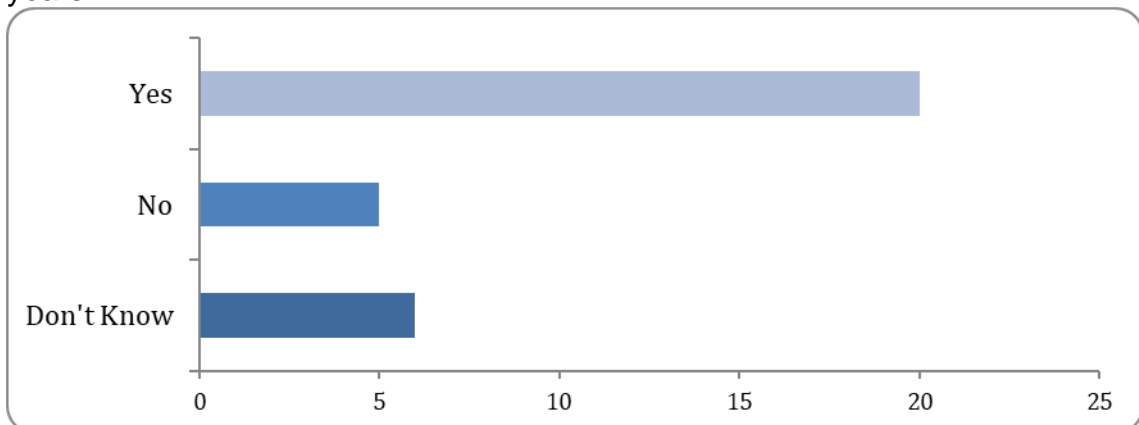
#### 4. Consultation with Schools

4.1 Given the rising SEN pressures highlighted to Schools forum, this year's consultation with Schools focussed mainly on SEN. Schools were consulted on the Schools Forum decision to transfer up to 0.5% from the Schools Block to the High Needs Block. There was also 2 questions relating to the Schools Block relating to the distribution of funding to Schools for 2024/25, these related to the level of MFG and the potential use of capping and scaling. A total of 31 Schools responded, numbers far higher than previous funding consultations which have attracted 8-10 responses. The full consultation results are attached at Appendix A, but responses to the key questions specifically involving 2024/25 School Funding are shown below. Details of the responses to the other School Funding consultation questions will be provided to February's School Forum meeting :

4.2 Schools were asked :  
Do you support the Schools Forum Decision to seek a 0.5% transfer (approx. £1.130million) from the Schools Block to the High Needs Block for the financial year 2024/25 ?



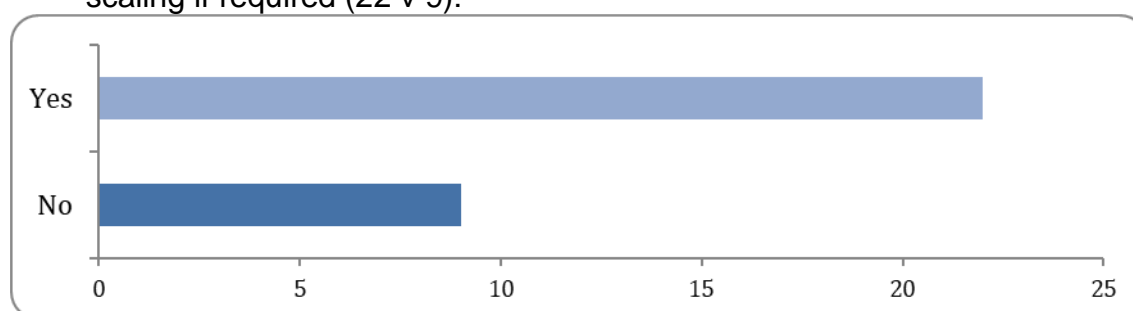
27 respondents were in support of the 0.5% transfer. A majority, albeit a smaller number also supported a potential larger transfer in subsequent years :



4.3 In relation to MFG level, 28 of the 31 responses were in favour of using 0.5%:

Option	Total	Percent
<b>0.0%</b> (using 21/22 data 6 schools would benefit sharing £120,412)	3	9.68%
<b>0.25%</b> (using 21/22 data 6 schools would benefit sharing £131,350)	0	0.00%
<b>0.5%</b> (using 21/22 data 13 schools would benefit sharing £152,794)	28	90.32%
<b>Not Answered</b>	0	0.00%

4.4 There was also a significant majority in favour of the use of capping and scaling if required (22 v 9):



This is particularly relevant in light of the lower levels of funding increases for 2024/25 and the agreement to support a higher level of transfer to the High Needs Block.

## 5. Early Years Block (Total 2024/25 EY Block funding £30,293,555)

Since April 2017 the Early Years Block has been subject to a National Funding Formula. Significant growth to funded entitlements will be introduced in 2024/25 as part of the Government support package for working parents. This will see an increase in the total Early Years Block of 58% compared to 2023/24, through the introduction of 15 hours funded childcare for working parents of children from 9 months by September 2024 increasing to 30 hours from September 2025.

Schools' forum will recall an in year (2023/24) uplift to all schemes from September 2024 via a supplementary grant that was passported directly to providers. This gave:

- a 6.8 % increase on the 3- and 4-year-old rate equating to an additional £0.33 per hour, 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, meaning an hourly rate of £7.27 from September.

The Northumberland Early Years National Funding Formula hourly rate for 3 and 4-year-olds, (i.e. the rate we are funded at as a County, including administration and management costs), has increased further to £5.47 for 2024/25. 13p of this reported

uplift includes the Teacher Pay and Pensions Grant (TPPG). This grant had historically gone directly to schools and not been a recorded part of the Early Years Block. It is proposed that for 2024/25 this is kept within the early years hourly rate and passported to all providers to support the whole sector with rising staffing and business costs.

The Northumberland Early Years National Funding Formula hourly funding rate for 2-year-olds has increased by 23p to £7.50 for 2024/25.

Historically, for 2-year-olds the rate received should be passed on directly to providers. However due to the introduction of the new entitlements for working parents of 2-year-olds this has changed and appropriate deductions can be made for supplements and central costs across the block excluding EYPP and DAF.

The Northumberland Early Years National Funding Formula hourly funding rate for under 2-year-olds is £10.20 for 2024/25.

The Disability Access Fund (DAF) annual rate has been increased from £828 (2023/24) to £910 (2024/25) and has been extended to meet all age ranges for the extended entitlement roll out.

The Early Years Pupil Premium hourly rate has been increased by 6p to 68p per hour for 2024/25 and will also be extended to all age ranges. Schools Forum will also recall that we agreed to significantly top up this rate through introducing further additional deprivation payments based on EY Pupil Premium eligibility with effect from April 2020. This will remain as a mandatory supplement for 3- and 4-year-olds only. The funding for the additional premium has not grown for 2024/25.

Early Years Block expenditure beyond the hourly rates, SEND and deprivation payments also includes the Early Years Team. They support around 400 providers and families with high quality training, assessment, guidance, Ofsted preparation, SEND, funding, sustainability and business management. The national minimum "pass through" level of funding (i.e. the % that must be paid directly to providers) is 95% of 3- and 4-year-old funding. Historically Northumberland settings have always received a pass through of above 95%. For 2024/25 this will be over 97%.

It is mandatory to have an Early Years Inclusion Fund this has historically been solely funded from the High Needs Block however due to the increasing need, we propose to retain 0.5% of the base rate of each stream to support this creating a budget of £142,515 which should be match funded from the High Needs block to meet predicted need.

The initial allocation for the Early Years Block for 2024/25 is £30,293,355 including the £406,451 allocation for the Early Years Pupil Premium (EYPP) and £254,800 for the Disability Access Fund (DAF). Both the EYPP and the DAF include allocations for 2 year olds and under 2s for 2024/25. It includes an initial allocation of £18,271,269 for 3 and 4-year-olds and an initial allocation of £2,857,197 for disadvantaged 2 - year-old children.

All these allocations are indicative and are based on the January 2023 census, they will be further revised in the light of the January 2024 and January 2025 census data. However, payments will continue to be made to schools and PVI settings

based on actual pupil numbers in each of the three terms, Summer 2024, Autumn 2024 and Spring 2025.

Considering the income and expenditure streams noted above, the proposed hourly payment rates for 2024/25 are shown below with 2023/24 figures for comparison:

	2023/24	2024/25	Increase
3 and 4-Year-Old Rate	£4.91	£5.20	£0.29
2-Year-Old Rate	£7.27	£7.27	£0
Under 2-Year-Old Rate	-	£9.87	-
Early Years Pupil Premium Rate (all age ranges)	£0.62	£0.68	£0.06
Northumberland Pupil Premium Plus Rate (3- and 4-year-olds only)	£0.76	£0.76	£0.00
Disability Access Fund (annually)	£828	£910	£82

The proposal for 2024/25 rates are based on the principles of-

- Passing on the maximum funding possible to providers to support all equally
- Maintaining the two-year-old base rate
- Passing on the full DAF uplift to providers
- Maintaining the Northumberland Pupil Premium Plus rates

It has been agreed with Corporate Finance that these proposed rates can be funded from within the overall EY DSG budget.

**Note 1 : Schools Forum is requested to note the following:**

**The Early Years Block budget to be set at the DfE allocation of £30,293,355 as detailed in Annex 1;**

**The 3- and 4-year-old rate will increase with a 29p uplift from £4.91 (2023/24) to £5.20 per hour (2024/25);**

**The 2-year-old rate will be maintained at £7.27 per hour (2024/25).**

**The under 2-year-old rate will be introduced at £9.87 per hour (2024/25).**

## **6. High Needs Block (Total 2024/25 HN Block funding £50,385,547)**

The latest indicative High Needs Block (HNB) allocation for 2024/25 is £53,831,547, a 5.4% uplift on the 2023/24 figure of £51,072,682, these figures are as published by the ESFA AFTER the Import Export adjustment. These figures are before deductions of £3,446,000 by the ESFA for direct funding of places by the ESFA of Pre and Post 16 in Academies, Post 16 in maintained special schools and post 16 in Independent Learning Providers (ILP) and Further Education (FE) establishments, as outlined in Annex 1.



The current 2024/25 allocation after these deductions is £50,385,547. This figure includes a £582,000 reduction in respect of the net import export adjustments, this has been reduced from £867,000 last year as a result of reviews of the data in relation to Northumberland students attending educational settings in other local authority areas.

Work is continuing on the detail of the total requirements within the High Needs Block, and it is recommended that the total 2024/25 budget for the High Needs Block is set at this time, with the detailed breakdown of that funding into the various services being provided to the Schools Forum meeting on 14 February 2024, together with details of the School Funding consultation responses. Setting the overall total for the High Needs Block is necessary at this time as final decisions in relation to the Schools Block must be made before the deadline of 22 February 2024 for submitting the APT and final mainstream school formula values to the DfE.

**Note 2:**

**The budget for the High Needs Block will be set at £50,385,547, after the deduction by the ESFA for the place funding outlined at Annex 1.**

**Recommendation 1:**

**To agree that the various budgets within the High Needs Block be set at the meeting on 14 February 2024.**

**7. Schools Block (Total 2024/25 Schools Block funding £226,051,476)**

The 2024/25 Primary unit of funding (per pupil figure) is £5,333.55 (£5,059.28 in 2023/24) and the Secondary unit of funding is £6,549.43 (£6,222.64 in 2023/24), giving a per pupil allocation of £225,531,860 (£215,114,179 in 2023/24). The addition of a fixed amount in respect of Growth and Premises of £4,177,792 gives a total Schools Block of £229,709,652, before the deduction for rates of £2,533,172, as set out in **Annex 1**.

As agreed by Schools Forum at the meeting on 17 November 2023 and the subsequent consultation with schools, a maximum transfer of £ 1,148,548 (0.5%) of the Schools Block to the High Needs block is available, this would reduce the amount available to the Schools Block to £228,561,104, (or £226,027,932, after the rates transfer) a figure £10,056,857 (5.1%) higher than the equivalent 2023/24 figure of £215,971,074. (NB these figures do not include the Mainstream Schools Additional Grant paid in 2023/24). In practice a slightly lower amount of £1,125,004 (0.49%) is being transferred. This enables Northumberland to continue to fund all formula values at NFF levels, but this is only possible through the use of £1,060,895 funding allocated to NCC to fund any required growth on a year to year basis, and through the application of capping and scaling measures. Without these measures it would not be possible to fund at NFF levels.

MFG is the mechanism that prevents excessive changes in the per pupil values on a year to year basis, that could potentially arise from changes in the overall student profile affecting low prior attainment and deprivation. The lump sum, sparsity and rates formula factors are excluded from MFG calculations by the ESFA in order to avoid excessive or inappropriate protection. A 0.5% Minimum Funding Guarantee (MFG) is being proposed, together with the use of capping and scaling means that

full National Funding Formula factors can still be used for Northumberland, while also making the 0.5% transfer to the High Needs Block.

As reported to the November 2023 meeting, the only disapplication request made to the ESFA in respect of 2024/25 is in respect of the transfer of funds between Schools within the Coquet partnership, as a result of the first phase of the transition to a standard primary / secondary system. This has been approved by the ESFA.

No further contribution to the growth fund or the falling rolls fund is anticipated in 2024/25.

As agreed at the 17 November 2023 Schools Forum meeting, and in conjunction with the associated 17 January 2024 Cabinet report, the decision on the final formula values is delegated to the Executive Director of Children', Young People and Education & Cabinet Member for Inspiring Young People. This is required in case of any adjustments following the submission of information to the ESFA by their 22 January 2024 deadline and the deadline for the confirmation of schools' budget shares to mainstream maintained schools by 29 February 2024. No changes are anticipated at this stage. As in previous years, it is intended to provide maintained schools with their 2024/25 budget via the Schools E-courier bulletin by the ESFA deadline of 29 February 2023. This covers the period from April 2024 to March 2025. The equivalent figures for academies will be included for illustrative purposes only; the ESFA is responsible for the provision of the general annual grant statements to academies for the period from September 2024 to August 2025 by 31 March 2024.

**Note 3:**

**The budget for the Schools Block to be set provisionally at £227,176,480, before the deduction of a proposed amount of £444,626 in respect of de-delegation. This figure is further reduced to £225,606,850 after the transfer of £1,125,004 to the High Needs Block.**

**Note 4:**

**School budget shares be provisionally constructed based on the formula values shown the final column of Table 1, including an MFG value of 0.5%, and capping and scaling values of 2.13% and 75% respectively subject to any adjustments required once the ESFA's decision is known.**

**Note 5:**

**Delegated powers to Executive Director of Children's Services to set the final formula values was agreed at the 17 November 2023 Schools Forum meeting.**

**Table 1**

**COMPARISON OF FINAL 2023/24 AND PROPOSED 2024/25 FORMULA VALUES FOR  
NFF AND NORTHUMBERLAND**

Factor (all figures £)	NFF Values	NCC Values	NFF Values	ProposedN CC Values	Movement in values 23/24 to 24/25	Movement in NCC values 22/23 to 23/24
	2023/24	2023/24	2024/25	2024/25		
col (a)	col (b)	col (c)	col (d)	col (e)	col (f)	col (g)
<b># AWPU Primary</b>	3,394	<b>3,394</b>	<b>3,562</b>	<b>3,562</b>	4.95%	5.50%
KS3	4,785	<b>4,785</b>	<b>5,022</b>	<b>5,022</b>	4.95%	5.49%
KS4	5,393	<b>5,393</b>	<b>5,661</b>	<b>5,661</b>	4.97%	5.50%
<b># Lump Sum Primary / Secondary</b>	<b>128,000</b>	<b>128,000</b>	<b>134,400</b>	<b>134,400</b>	5.00%	5.52%
<b>Deprivation - Free School Meals Primary</b>	480	<b>480</b>	<b>490</b>	<b>490</b>	2.08%	2.13%
Secondary	480	<b>480</b>	<b>490</b>	<b>490</b>	2.08%	2.13%
<b># Deprivation – FSM6 Primary</b>	705	<b>705</b>	<b>820</b>	<b>820</b>	16.31%	19.49%
Secondary	1030	<b>1030</b>	<b>1,200</b>	<b>1,200</b>	16.50%	19.08%
<b>Deprivation – IDACI:</b>						
Primary Band F	230	<b>230</b>	<b>235</b>	<b>235</b>	2.17%	4.55%
Band E	280	<b>280</b>	<b>285</b>	<b>285</b>	1.79%	3.70%
Band D	440	<b>440</b>	<b>445</b>	<b>445</b>	1.14%	4.76%
Band C	480	<b>480</b>	<b>485</b>	<b>485</b>	1.04%	4.35%
Band B	510	<b>510</b>	<b>515</b>	<b>515</b>	0.98%	4.08%
Band A	670	<b>670</b>	<b>680</b>	<b>680</b>	1.49%	4.69%
Secondary Band F	335	<b>335</b>	<b>340</b>	<b>340</b>	1.49%	4.69%
Band E	445	<b>445</b>	<b>450</b>	<b>450</b>	1.12%	4.71%
Band D	620	<b>620</b>	<b>620</b>	<b>620</b>	0.00%	4.20%
Band C	680	<b>680</b>	<b>690</b>	<b>690</b>	1.47%	4.62%
Band B	730	<b>730</b>	<b>740</b>	<b>740</b>	1.37%	4.29%
Band A	930	<b>930</b>	<b>945</b>	<b>945</b>	1.61%	4.49%
<b>Low Attainment Primary</b>	1,155	<b>1,155</b>	<b>1,170</b>	<b>1,170</b>	1.30%	2.21%
Secondary	1,750	<b>1,750</b>	<b>1,775</b>	<b>1,775</b>	1.43%	2.34%
<b>EAL Primary</b>	580	<b>580</b>	<b>590</b>	<b>590</b>	1.72%	2.65%
Secondary	1,565	<b>1,565</b>	<b>1,585</b>	<b>1,585</b>	1.28%	2.29%
<b>MOBILITY : Primary</b>	945	<b>945</b>	<b>960</b>	<b>960</b>	1.59%	104.10%
Secondary	1,360	<b>1,360</b>	<b>1,380</b>	<b>1,380</b>	1.47%	104.51%
<b>SPARSITY(max): Primary</b>	56,300	<b>56,300</b>	<b>57,100</b>	<b>57,100</b>	1.42%	2.36%
Middle	81,900	<b>81,900</b>	<b>83,000</b>	<b>83,000</b>	1.34%	2.38%
Secondary/All Through	81,900	<b>81,900</b>	<b>83,000</b>	<b>83,000</b>	1.34%	2.38%
<b>Capping</b>		-		2.13%		
<b>Scaling</b>		-		75%		
<b>Minimum Funding Guarantee</b>		0.5%		0.5%		
<i>(range of 0 to 0.5% dictated by ESFA for 2024/25)</i>						
<b># Increases in AWPU, Lump Sum and Deprivation - FSM6 influenced by MSAG element</b>						
	<ul style="list-style-type: none"> <li>£119, £168 and £190 have been added to the Primary, KS3 and KS4 AWPU's</li> <li>£104 and £152 to the Primary and Secondary FSM6 factors; and</li> <li>£4,510 to the Lump Sum</li> </ul>					

## 8. De-Delegation

The School and Early Years Finance Regulations, last updated in February 2023 permit that certain services can have funding centrally retained by the de-delegation of funding from maintained schools (but not from academies) with the specific approval of the relevant members of the Schools Forum. Academies are free to purchase these services, either through a Service Level Agreement (SLA) or on a Pay As You Go basis. Special Schools and the PRU are not affected by the de-delegation but can also participate through the SLA or on a Pay As You Go basis.

De-delegated funding is therefore formally requested in respect of the remaining 4 services for maintained mainstream schools:

	2023/24 Estimate (£)	2024/25 Estimate (£)	Cost per eligible unit (unchanged)(£)
Contingency Fund for School Restructure and Re-organisation costs	328,212	315,200	20.00
Determination of FSM Eligibility	22,832	22,606	6.00
Trades Union Facility Time	53,334	51,220	3.25
English as an Additional Language (EAL) services	53,111	55,600	220.00
<b>TOTAL:</b>	<b>457,489</b>	<b>444,626</b>	<b>-</b>

De-delegation is an integral part of the way in which these services are funded, and any changes would require a significant change of the way of working with schools. Cash values have been held at the same level as 2020/21 for all de-delegated budgets.

### Recommendation 2:

**Schools Members of the Schools Forum representing maintained mainstream schools agree on a phase by phase basis to the de-delegation in respect of the four services listed above for 2024/25 using the per unit values, and estimated overall values as set out in the final column of Annex 1.**

## 9. Central School Services Block (Total 2024/25 CSSB funding £2,157,405)

This block was newly created in 2018/19 and comprises of funding for ongoing statutory responsibilities of the Council and a cash sum for historic commitments. The 2024/25 allocation for this block is £2,157,405, a figure £111,585 (4.9%) lower than the 2023/24 allocation of £2,268,990. This reduction in the historic element was expected and has previously been reported.

As with the High Needs Budget, the overall budget will be set at £2,157,405 in line with the allocation, with the details of the budget being provided to the February Schools Forum meeting.

### Note 7:

**The budget for the Central Schools Services Block will be set at £2,157,405 as set out in Annex 1**

**DEDICATED SCHOOL GRANT (DSG) ALLOCATION 2024/25 - FINAL (as at 22 December 2023)**

**Annex 1**

	Pupils	Unit Value	
<b>Schools Block</b>			
Main Primary	22,172.0	5,333.55	118,255,471
Main Secondary	16,379.5	6,549.43	107,276,389
Premises	38,803.5		3,116,897
Growth			1,060,895
			<b>229,709,652</b>
NNDR Within the Premises Factor (Deducted and paid directly)			<b>-2,533,172</b>
Total Schools Block after Deduction of NNDR			<b>227,176,480</b>
Transfer to High Needs Block			<b>-1,125,004</b>
			<b>226,051,476</b>
Falling Rolls Fund			<b>0</b>
			<b>226,051,476</b>
Proposed De-delegation			<b>-444,626</b>
Schools Block AFTER De-delegation			225,606,850
<b>Central School Services Block</b>			
Pupil nos	38,551.5	38.63	1,489,245
Historic Commitments (NB 20% Reduction)			668,160
			<b>2,157,405</b>
<b>Early Years Block</b>			
3/4 Year Olds	3,931.76	3,117.90	12,258,835
3/4 Year Olds - Additional 15 hours	1,928.36	3,117.90	6,012,434
2 Year Old Entitlement - WPs	1,177.67	4,275.00	5,034,540
2 Year Old Entitlement - Disadvantaged	668.35	4,275.00	2,857,197
Under 2s entitlement	596.68	5,814.00	3,469,098
Initial Allocation EYPP - 3 & 4 year olds	674.44	387.6	261,413
Disability Access Fund - 3 & 4 year olds	198.00	910	180,180
Initial Allocation EYPP - under 2 year olds	17.82	387.6	6,908
Initial Allocation EYPP - 2 year olds	356.37	387.6	138,130
Disability Access Fund - 2 year olds	58.00	910	52,780
Disability Access Fund - under 2s	24.00	910	21,840
			<b>30,293,355</b>
<b>High Needs Block</b>			
			53,831,547
<b>HN Place deductions</b>			
Mainstream Academy Pre 16	0	6,000	0
Mainstream Academy Post 16	31	6,000	-186,000
Special Academy Pre 16	211	10,000	-2,110,000
Special Academy Post 16	27	10,000	-270,000
Special Free Schools Pre-16 SEN	40	10,000	-400,000
Mainstream Post 16	0	6,000	0
ILP and FE	80	6,000	-480,000
Alternative Provision Academies and Free Schools	0	10,000	0
Total Deductions to HN Block for Direct Funding of Places by ESFA			-3,446,000
ADD: Transfer from Schools Block			
<b>TOTAL HIGH NEEDS BLOCK AFTER DEDUCTIONS</b>			<b>50,385,547</b>
<b>TOTAL 2024/25 DSG</b>			<b>315,991,959</b>
<b>TOTAL 2024/25 DSG after NNDR &amp; HN ESFA places</b>			<b>310,012,787</b>

**2024/25 De-delegation Summary :**

Contingency	315,200
Trade Union Facility time	51,220
EAL	55,600
FSM Eligibility	22,606
	<b>444,626</b>

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## Northumberland County Council SCHOOLS' FORUM

### Agenda Item 7

17 January 2024

#### 2024 WORK PROGRAMME AND MEETING DATES

**Wednesday 17 January 2024: 9.30-12.00 (Virtual Meeting)**

Setting the DSG for 2022/23 – overall allocations  
De-delegation decisions for 2022/23

**Wednesday 14 February 2024: 9.30-12.00 (Virtual Meeting)**

Setting the DSG budget for 2022/23 – individual budgets

**Wednesday 17 July 2024: 9.30-12.00 (Face to Face Meeting, Council Chamber, County Hall Morpeth)**

DSG Provisional Outturn  
Scheme for Financing Schools  
Analysis of School Balances

**Wednesday 25 September 2024 : 9.30-12.00 (Virtual Meeting)**

NFF Update  
Review of Schools Forum Membership

**Wednesday 27 November 2024 : 9.30-12.00 (Virtual Meeting)**

National Funding Formula Update & Consultation for 2023/24  
SEN Update

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