

Public Document Pack



Northumberland County Council

Your ref:

Our ref: AT

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Date: 10 November 2021

Dear Sir or Madam,

A virtual meeting of the **SCHOOLS' FORUM** will be held on **WEDNESDAY, 17 NOVEMBER 2021 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

**Copy to Cath McEvoy-Carr, Executive Director of Children's Services and Councillor
Guy Renner-Thompson**

AGENDA

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

		Decision/Consultation/ Information/Action
1.	MEMBERSHIP AND MEMBERSHIP UPDATE	Information
2.	APOLOGIES FOR ABSENCE	Information
3.	DISCLOSURES OF INTERESTS (IF ANY)	Information
4.	MINUTES AND MATTERS ARISING (Pages 1 - 8) Minutes of the meeting of the Schools' Forum held on Wednesday 29 September 2021, as circulated, to be confirmed as a true record, and signed by the Chairman.	Action
5.	COMMUNICATION: (Pages 9 - 12) FFC Committee Draft Minutes 03 November 2021 (ATTACHED)	Information
6.	SCHOOL ORGANISATION PLAN 2021-24 (ATTACHED) (Pages 13 - 76)	Information
7.	SCHOOLS BLOCK NFF: SPARSITY CONSULTATION GOVERNMENT RESPONSE AND POTENTIAL CHANGES TO SPARSITY FUNDING 2022/23 (ATTACHED)	Information
8.	SEN UPDATE (Pages 77 - 82)	Information
9.	COMPARISON OF NE SCHOOLS BLOCK FUNDING FORMULA VALUES 2021-22 (REPORT AND PRESENTATION) (Pages 83 - 86)	Information
10.	NATIONAL FUNDING FORMULA AND 2022/23 SCHOOL FUNDING CONSULTATION (ATTACHED) (Pages 87 - 102)	Information Consultation
11.	2021/22 WORK PROGRAMME AND MEETING DATES (ATTACHED) (Pages 103 - 104)	Information
12.	ANY OTHER BUSINESS	Information/Action
13.	DATE OF NEXT MEETING The next scheduled meeting of the Schools' Forum is	Information

	Wednesday 19 January 2022.	
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NORTHUMBERLAND COUNTY COUNCIL

SCHOOLS' FORUM

At a virtual meeting of the Schools' Forum on Wednesday, 29 September 2021 at 9:30 am.

PRESENT

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

Headteacher Representatives

F Hartland, Kielder Primary	B Ryder, Berwick Middle
N Threlfall, Vincent Edwards Primary	N Brannen, Whalton C of E Primary

Governor Representatives

K Faulkner, Collingwood School and Media Arts College	B Watson, St Robert's RC First I Walker, Duchess' High G Wilkins, St Wilfrid's RC Primary
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Academies Representatives

G Atkins, Queen Elizabeth High Alan Hardie (NCEA Trust), A Crawley (Substitute JCSC)	A Thelwell, Bede Academy S Wild, NCEA Castle
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Church of England Diocese - Nicola Threlfall

Early Years' Representative – Kath Dickinson

Trades Union Representative - Not present

16 - 19 Provider of Education Representative - Not present

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OFFICERS IN ATTENDANCE

S Aviston	Head of School Organisation and Resources
H Bowers	Democratic Services Officer
A Kingham	Director of Education and Skills
B Parvin	Education and Skills Business Manager
C Ponting	Senior Manager, Schools HR
A Russell	Principal Accountant
D Street	Deputy Director of Education
N Taylor	Head of Inclusive Education Services

13. MEMBERSHIP AND MEMBERSHIP UPDATE

- 13.1 Mr Parvin took the opportunity to welcome Nichola Brannen from the Federation of Whalton and Longhorsley and welcomed her to her first meeting. There were still vacancies for representatives to join the forum.

14. APOLOGIES FOR ABSENCE

Apologies for absence were received from M Deane-Hall.

15. MINUTES AND MATTERS ARISING

RESOLVED that the minutes of the meeting of the Schools' Forum held on Wednesday, 07 July 2021, as circulated, be confirmed as a true record and signed by the Chair.

Matters Arising:

- 15.1 The Chair asked that thanks be conveyed to Andrea Todd, Democratic Services Officer for collation of agenda papers and reports which had made it easier to read. Mr Parvin said he would pass these thanks on.
- 15.2 Minute 90.6: No-one had come forward as Chair or Vice Chair of the Funding Formula Committee, but the Chair was aware of two potential candidates and would contact them.
- 15.3 Minute 92.1: Outcome of retrieval of money from Bright Tribe. As Councillor Renner- Thompson was not at the meeting an update was provided by Mrs Audrey Kingham. She had met with the Regional Schools Commissioner who had no plans to recover the money. The matter was between DfE and Bright Tribe but the

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forum's view regarding the matter had been shared with the Regional Schools Commissioner and DfE.

- 15.4 Minute 92.2: The Capital Investment Plan was on the agenda. The new School Organisation Plan would be presented at a later meeting.
- 15.5 Mrs Kingham referred to inaccuracies in the minutes to her name and stated that she was no longer Interim Director of Education and Skills. The Chair gave his apologies and the inaccuracies were noted. The Chair gave his congratulations to Mrs Kingham.
- 15.6 The ongoing nature of the meetings would be virtual for the foreseeable future.
- 15.7 Minute 94.9: The membership, terms of reference and powers of the Schools Forum would be published.
- 15.8 Minute 95.6: Mr Parvin stated that the minute recorded that the Deputy Director of Education had suggested the forum may wish to consider using the surplus DAF to support early years, whilst this was welcomed it would be an authority decision and the prime focus would be to address the underspend of the DAF and how it would be continued to be allocated.

Mr Street added that this was an ongoing work stream to try and allocate to those learners that were entitled to it. There were a number of providers who had not been able to access grants available.

- 15.9 Minute 95.9: There had been a number of Central Government grants available to the early years sector to support them through Covid and loss of income, but some had not qualified. The end of the year finance for the early years team had developed internal grants to anyone in Northumberland who had not been able to get a grant through the business scheme and had demonstrated they had had a loss of income. A number of grants had been paid and if there was any funding left available, it was hoped to get that out to those who were applicable.

16. COMMUNICATION

- 16.1 Mr Parvin referred to the draft minutes of the Formula Funding meeting which were included in the agenda pack. Another Formula Funding committee was scheduled for 3 November, which would take place two weeks before the Schools Forum meeting and would include the formal consultation for 22/23.

(The next agenda item was brought forward)

Ch.'s Initials.....

17. FAIR FUNDING FOR ALL: COMPLETING THE REFORMS TO THE NATIONAL FUNDING FORMULA

- 17.1 Mr Parvin stated that the DfE consultation had previously been circulated and discussed at the Formula Funding Committee. Members received a presentation prepared by the F40 group regarding the DfE consultation which commenced on 8 July and would end on 30 September. He explained the background and the scope of the consultation together with the consultation questions and proposed responses. The presentation would be circulated after the meeting. Any members wishing to submit a response, should do so by the close of play on 29 September.
- 17.2 In response to a comment regarding the moving all Schools to being funded on an academic year basis, Mr Parvin advised that he did have concerns about the impact on the consolidation of maintained school finances into the local authority accounts.
- 17.3 Mr Atkins commented on the benefit of aligning the financial year with the academic year.

18. SCHOOLS FORUM CAPITAL UPDATE

- 18.1 Sue Aviston, Head of School Organisation and Resources highlighted some of the key facts in the report which initially had been produced for the Family and Children's Services Overview and Scrutiny Committee and gave an update on the level of investment in academies and maintained schools.

The key issues were:

- A continual challenge for schools and the local authority in maintaining the school estate costs with a backlog of £57m of maintenance, which continued to be a challenge to keep schools safe and open
 - Growing capacity in the demand for places, eg Chantry and Newminster
 - Surplus places where there was not the demand; there were nearly 9000 surplus places in October 2020.
- 18.2 In response to a question regarding surplus places, Mrs Aviston stated that this continued to move upwards; the figures would be in the public domain shortly. There were less children in schools than there were 5 years previously, particularly in the rural counties. The information could be circulated to staff following the Family and Children's Overview and Scrutiny meeting.
- 18.3 A further key issue was securing school funding, due to school partnership changes in its organisation, eg, Ponteland.
- 18.4 Overall, Northumberland County Council had invested a significant amount of funding in all of its schools. Since 2018, over £101m had been invested in delivering the school capital programme with 69 projects delivered in 63 schools,

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ranging from £19,000 to £43m. The detailed programmes were contained within the report.

- 18.5 The school capital investment programme covered smaller projects such as windows, boilers, etc contributing to 48 projects over £4.8m. There had been significant challenges on some of the projects due to Covid, with projects increasing in price and a shortage of materials.
- 18.6 Capital funding had been received from Central Government for nurseries to the value of £446,000.
- 18.7 Projects had been delivered to the value of £7m at St Benet Biscop School in Bedlington, due to reorganisation changes. Additional funding had also been received for educational infrastructure from housing developers with the first project rolled out at Stannington First School.
- 18.8 The next area of growing demand was in Special Schools, current funding from the DfE in growth capacity had been received in the region of £850,000 which did not address levels of demand.
- 18.9 Over the last 21 months, 5 projects of just over £3m had been delivered to special school sites at Ashdale, Hexham Primary and Hillcrest in Cramlington. There had been a successful bid for a special free school in Northumberland which had a target date of September 2022, but this had been delayed due to shortages in the construction market.
- 18.10 There had been two larger school builds at Darras Hall Primary and Morpeth First School, with a spend of £12.6m.
- 18.11 Haydon Bridge had received support investment due to re-organisation for 4 projects of £5.2 million and work had also been carried out at the old Haltwhistle Middle School which had been converted from a middle school to a primary school.
- 18.12 Ponteland School and the Leisure Centre had opened later due to the pandemic. Funding of £43m had brought together the high school, library and leisure centre and also included the fire station.
- 18.13 The first phase of the Academies Project Scheme had been delivered late due to the pandemic, but this had been completed and the second phase was due to be completed in April 2022.

The report was shared on line highlighting some of the projects.

- 18.14 The Chair requested that some narrative comments which had been received were covered in the report, specifically in relation to beneficiaries of S106 funding and when this could be accessed. Mr Parvin stated that he had already responded to the comments but explained that developers' contributions would be received subsequently on the delivery of capacity. Mrs Aviston added that when a

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development was on the watch list, a drive by would take place to consider housing numbers. S106 funding took time to come to fruition with staged payments and any funding being needing justification in terms of additional educational placements. Officers kept in regular touch with schools and the information was also published within the School Organisation Plan.

- 18.15 Mrs Aviston responded to a query regarding access to SCIP funding and advised that data was held for each school and buildings were independently surveyed, ranked and scored, however this could be re-prioritised if individual schools felt they had a case.
- 18.16 The report referred to the breakdown on some of the smaller projects. A specific mention was made to Cramlington Village Primary Schools for an outdoor class by Debbie Wylie and said that Sue and her team had gone over and above what was expected for the outdoor classroom. The room would be able help with speech and listening development and house and offer nursery places which also ran during the holidays. She thanked the team in supporting the application.

Mrs Aviston was thanked for the information.

19. NATIONAL FORMULA FUNDING AND SCHOOLS FUNDING UPDATE

- 19.1 Mr Parvin shared the report online and reported that at the meeting of the Schools Forum in November 2020, a two-step approach had been agreed to the adoption of national funding figures as shown in page 97 of the report. Work was being carried out to smooth the transition and providing a degree of protection to those schools who would benefit.

(Debbie Wylie left the meeting at 10.55).

- 19.2 Provisional figures indicated that funding could be delivered and new information from DSG figures, showed school funding increasing overall. Following the consultation around sparsity, the amount of funding distributed had been increased which was encouraging for Northumberland.
- 19.3 Central Schools services block - there was a reduction to on-going responsibilities which had put pressure on the Council. Engagement had continued with the ESFA in relation to this block, the representations had reflected some of the comments through the consultation.
- 19.4 Mr Parvin referred to the table for the national formula funding for 2022-23 and how much funding was allocated nationally and would mean implications for Key Stage 4 in Northumberland, where the Age Weighted Pupil Unit (AWPU) figure was currently higher than NFF.

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- 19.5 Free School Meals (FSM) levels had been increased last year and was always subject to affordability, this was seen as an exceptional intervention for 2021/22 and would need to be looked at in terms of the balance for 2022/23 figures.
- 19.6 There were no proposals yet around capping and scaling but needed to be examined to see if it was required for 2022-23 and no growth figure were reflected yet in the provisional figures in Northumberland.
- 19.7 The proposals would be examined in more detail at the Formula Funding meeting on 3 November and the final consultation proposals would be brought back to Schools Forum on 17 November, with consultation with Schools through November and December, final figures received from the ESFA in December and a report to the Cabinet meeting in January 2022.

If any member wished to attend the next formula funding meeting, this would take place at 9:30 am on Wednesday 3 November.

Mr Parvin and his team were thanked for their hard work.

20. 2020/21 WORK PROGRAMME AND MEETING DATES

- 20.1 Mr Parvin advised that a schedule of dates for the next academic year had been sent out.
- 20.2 The High Needs Committee meeting had been cancelled for October, but a further meeting would take place in December.

21. DATE OF NEXT MEETING

The next meeting would take place on Wednesday, 17 November 2021 at 9:30 am.

CHAIR_____

DATE_____

Ch.'s Initials.....

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Northumberland County Council

Wellbeing and Community Health Services

Group

Education and Skills Service

Meeting: Formula Funding Sub Committee of the School's Forum
Date: 03/11/2021
Time: 9.30am
Venue: Virtual Teams Meeting

Present: Colin Pearson (Acting Chair, Director 3 Rivers Trust) Graeme Atkins (HT, Hadrian Learning Trust) Mike Deane-Hall (HT Wooler First and Glendale Middle) Bruce Parvin (Education & Skills Business Manager)	Darren Warburton (Finance Director, Bede Academy) Ben Watson (Governor, St Roberts RC First School) Graham Wilkins (Governor, St Wilfrid's RC Primary)
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Notes Lisa Headington

Start time:		Action:
1.	Welcome and Introductions: All members welcomed and it was agreed for Colin Pearson to chair this meeting in Ben Watson's initial absence.	
2.	In Attendance: As above.	
3.	Apologies: Ben Ryder and Sue Aviston	
4.	Membership And Membership Update BP confirmed no further update or expression of interest in membership. Hoping for more interest next year. CP reported that Ben Watson has agreed to chair the Funding Formula Sub Committee, but was unable to attend the start of the meeting due to commitments in school.	
5.	Declaration of personal or pecuniary Interest in any agenda item. No declaration of pecuniary interest declared by members	
6.	Minutes of the previous meeting/Matters arising from Previous Minutes: All agreed Minutes held on 15 th September 2021 as a true record.	
7.	School's Block NFF: Sparsity Consultation Government Response and potential changes to Sparsity funding 2022/23 BP confirmed that this paper, and others on agenda, would also go to Schools Forum as well as Funding Formula Committee, notwithstanding any comments. BP approached School's Forum back in November 2019 around the disapplication request to the ESFA about a change in methodology for them to use measurement of sparsity by road distances rather than the other "as the crow flies" methods which is still currently used by the ESFA. School's Forum supported this and there was a total of £141,000 allocated to six schools from the 2020/21 DSG and we repeated this for 2021/22. There was a national consultation earlier this year in relation to this issue. Subsequently the government response to the	



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	<p>consultation has been published in September, copy of which is available at the link.</p> <p>Among the key recommendations is that road journeys be used as their method of calculation for sparsity distances as opposed to “as the crow flies”.</p> <p>There are two measures that determine whether the school qualifies for sparsity funding. One is the average year group size which varies depending on the phase (e.g for First and primary 21.4 students per year group) and the second criteria is around the average distance of pupil would have to travel to attend their next suitable school should the school was to close. There is a threshold of an average of two or three miles depending on phase.</p> <p>CP checked if both of those criteria had to be fulfilled for schools to qualify. BP confirmed this is the case.</p> <p>It is pleasing to see that the DFE and the ESFA have considered this area and they are adopting the preferred method supported by Northumberland by road, as well as making additional investment in sparsity. The total allocation for 22/23 is set to increase to the £95 million, which is a £53 million increase on the 21/22 figure.</p> <p>Based on October 2020 data, Northumberland will receive an estimated increase of £719,000, or a total of £2.6 million.</p> <p>The result of the consultation and sparsity in additional funding distributed is beneficial in Northumberland. CP commented this was a success story and the fact that this is new money is excellent and acknowledged BPs efforts on behalf of the School's Forum.,</p> <p><i>Ben Watson joined the meeting.</i></p>	
8.	<p>Comparison of 2021-22 NE Schools Block Funding Formula Values</p> <p>A report had been circulated and a presentation made showing how Northumberland’s respective formula values for 2021/22 compared to the other NE authorities and Cumbria (as a geographic neighbour). The key items discussed were the possible inclusion of a mobility factor within Northumberland's funding formula. It was highlighted that this was included with the NFF and that 11 of the 13 authorities currently used this.</p> <p>It was agreed that further consideration should be given to the use of a mobility factor, exploring a phased two step approach as had previously been adopted where other values were not in line with NFF.</p>	BP



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	<p>The use of Growth and Falling Rolls Funds were also discussed. Information from the ESFA was circulated at a link within the report. 11 of the 13 LAs, including Northumberland, used a Growth Fund. 2 of the 13 LAs had a Falling Rolls fund in 2021/22. Falling Roll funds were subject to key criteria, as required by the ESFA, which included :</p> <ul style="list-style-type: none">• Support was only available to good or outstanding schools; and• Local planning data needed to show that the surplus school places would be needed within the next 3 financial years <p>It was agreed that subject to available funding that further consideration should be given to a Falling Rolls fund for Northumberland.</p>	BP
9.	<p>National Funding Formula and Dedicated Schools Grant, including consultation on 2022-23 Funding Values</p> <p>November Schools Forum meeting is the key consultation meeting around school funding for 22/23. There are three separate items on the agenda, but they are informing members in relation to subsequent consultation on 2022/23 funding.</p> <p>The report shared with members was discussed. As the final figures are not made available by the ESFA until late December, and Cabinet approval is required at their January meeting, recommendations seek agreement to the setting of formula values in line with the principles outlined in the report, with the delegation of final decision to the Executive Director of Adults and Childrens Services. The final submission to the ESFA is required by 21 January 2022.</p> <p>Appendix A contains a table showing key NFF and proposed Northumberland Formula Values. Essentially, we are looking to complete the 2-phase approach to NFF we agreed last year.</p> <p>Indicative overall DSG funding for 2022/23 was shown for the Schools, High Needs and Central Services to Schools Blocks respectively. These would be updated once October 2021 census data was available. FSM rates were also above NFF for 2021/22 but the starting position for this now needs to be NFF, subject to affordability.</p> <p>It remains Northumberland's intention to seek a transfer of up to 0.5% from the Schools Block for 2022/23, that would be the maximum figure requested. This would support the continued provision of inclusive education services offer, that was previously funded through SLA (Service Level Agreement) charges. The costs of this in 2021/22 are £2.055 million, whereas the maximum funding there be transferred based on the provisional settlement figure would be £1.043 million with the balanced funded from the high needs block.</p> <p>Further information to be shared at the January and February meetings in relation</p>	



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	<p>to this. There continues to be pressures on high needs in terms of growing numbers of applications and requests for education, health and care plans.</p> <p>In relation to the Central School Services Block funding, taking the second line first, we are aware of the reductions to the historic element of the responsibilities based on retirement costs and capital costs and have mitigated that accordingly. Discussions with the ESFA last year and had our provisional figure increased to the £1.305 million.</p> <p>It was disappointing to see that within the ongoing responsibilities there was a reduction in the pupil element that it's based on for Northumberland. This year we've sought additional information in relation to that. This funding covers responsibilities for admissions and pupil place planning.</p> <p>We will get a settlement figure through in December and see where we stand in relation to previous years, this will also include EY information.</p> <p>Pupil numbers are of course key around this and will dictate final budget figures.</p> <p>In summary :</p> <ul style="list-style-type: none">• Support was reiterated for the previously agreed two phase move to NFF rates; that is the key starting point• According to financial availability:• We should if possible establish MFG at 2%, thereby giving the largest possible per pupil increase to all schools;• It was agreed that we could continue to use capping and scaling for 2022/23 to ensure affordability as we move towards NFF;• A mobility element should be included, at a reduced 50% value in line with the general phased approach;• The use of a Falling Rolls fund should be further investigated. <p>BP agreed this was helpful in establishing principles towards setting values for 2022/23.</p>	
10.	Any Other Business No other business discussed, CP thanked everyone for a very useful meeting and thanked all for their attendance and attention.	
Date and Time of Next Meeting: To be confirmed		

School Organisation Plan 2021 - 2024



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Document Revision Information			
Version	Date	Author	Description
V 2.0	September 2021	S Aviston	Plan 2021-24

FOREWORD

Although no longer a statutory requirement, the Northumberland School Organisation Plan is becoming an increasingly important document for demonstrating how the Council plans to fulfil its statutory duty to ensure that each school-age child and young person living in the county has a local school place available to them.

The plan also sets out the way schools and academies in Northumberland are organised within school partnerships that provide a structured pathway from phase to phase as children progress along their educational journey. How the council is addressing the growing needs of children and young people with special educational needs is also included in this plan. A key focus of the Council is of course the climate emergency and how school place planning is taking this into account to support the Council's Climate Change Action Plan 2021-2023 is also included in this plan.

A good education gives every young person the foundation for achieving to the best of their potential. Northumberland County Council aims to give every child and young person living in the county the best possible life chances by providing the very best opportunities in education in good schools that provide well for their needs, and as close to their home communities as possible. This plan is a key element in our work to ensure this aim becomes a reality for all children and young people living in Northumberland.

Councillor Guy Renner-Thompson
Portfolio Holder for Children and Young People

1. INTRODUCTION

1.1 Purpose of the School Organisation Plan

The Council's Corporate Plan for 2020/21 sets out one of its key Objectives as 'Learning; We Want you to achieve and realise your potential'. While this objective is applicable to all residents within the context of life-long learning, a key feature of this vision is the desire to ensure that all children and young people in Northumberland have the same opportunities as their peers to achieve and realise their potential.

This is the second iteration of the School Organisation Plan for Northumberland and covers the period 2021-2024 and like the previous version, it supports this vision by setting out how the council will fulfil its statutory duty to provide sufficient school places for all children and young people resident within the county.

Northumberland's mix of a large expanse of sparsely populated rural area and densely populated urban towns, particularly in the South East corner, continues to pose a challenge to finding a balance of sufficient and sustainable school places to serve the needs of these often very different types of communities. This plan provides an overview of the current and future pupil numbers in Northumberland which will assist the Council with planning the future provision of school places in the county. The plan will also be of assistance to schools and academies, parents and other stakeholders in helping them to understand how the availability of school places across the country is monitored, how the need for school places is identified and where necessary, how additional places are delivered and funded.

This School Organisation Plan contains the latest statistical information and data relating to pupils within specific school partnerships, as well as changes relating to school organisation in some areas and will be updated annually to reflect changes to data within the school year.

Following approval from the Council's Cabinet, this new school organisation plan will be circulated to all Northumberland schools and academies and to the relevant Diocesan Education authorities for comment.

2. THE NORTHUMBERLAND CONTEXT

2.1 School Organisation Plan links to standards and performance in education in Northumberland

Responsibility for the School Organisation Plan lies with the School Organisation and Resources Team within Education and Skills Group, which in turn forms part of the Wellbeing and Community Health Service in Northumberland. The plan provides an analysis of the current capacity and numbers on roll in Northumberland schools and highlights any planned work to be undertaken to meet any identified need for additional places or to address surplus places. As such, the School Organisation Plan supports the Education and Skills Service in delivering the priorities set out in its Service Statement 2019/20 by:

- providing data, information and context to support school organisation initiatives that are planned to have a direct and positive impact on standards and performance in schools;
- identifying and delivering capital projects to provide additional places or enhance the schools estate that will improve the educational experience of children and young people in Northumberland.

The Education and Skills Service Priorities for 2021 are available to review [here](#).

2.2 Headline population data

In Northumberland, 96.7% of the land mass is classed as rural, with 46% of the population living in this area. The other 54% of the population live mainly in the South East area of the county. In relation to the population itself, the county has an estimated population of 323,820 (mid-year population estimates 2020, a 0.4% growth on the 2019 estimate, which had also seen slight increase from the previous level. According to the Office for National Statistics, the county's population is now forecast to increase by 4.7% to around 339,415 between 2021 and 2043. This has changed from the forecast decrease in population set out in the previous version of this plan, although it is less than the England average which is forecast to increase by 8.3% over the same period.

However, the increase in population does not appear to be in younger age groups; the number of children and young people aged 0 to 15 living in Northumberland has been slowly but steadily declining for a significant number of years, with circa 57,500 in 2001, 55,000 in 2006 and 52,068 in 2020 (Mid-Year Population Estimates 2020). The birth rate in Northumberland has also declined slightly by about 0.1% overall between 2008 and 2019, with the County's General fertility rate (GFR) at 51.1 (per 1000 female population age 15-44) compared to 57.7 for England. However, there is variation at the school partnership level, which is addressed in Section 7, Projections and Place Pressures.

2.3 Schools and academies

As at September 2021, there were 163 schools, academies and free schools (not including independent schools) in Northumberland who currently educate 44,984 children and young people (October 2020 census - Nursery to Year 13); this is a fall of 1% from 45,407 recorded in January 2019 census, reported in the previous version of this document.

Categories of Schools

Schools are classified into two main categories. The first category is academies and free schools, which are funded directly by central government and where the local authority has no statutory responsibility. The second category is local authority maintained schools, which are then further split into 4 sub-groups Community, Voluntary Aided (VA), Voluntary Controlled (VC) and Foundation/Trust schools. The local authority does have various levels of responsibilities within maintained schools, depending on the sub-category e.g. school organisation matters, funding and admission arrangements.

Academies / Free Schools

Northumberland currently has 47 academies; these schools receive their funding directly from the government, and not via the local authority. They are run by an academy trust which employs the staff. Some academies have sponsors such as businesses, universities, other schools, faith groups or voluntary groups, and in Northumberland there are currently 14 sponsored academies, 32 converter academies, and 1 free school. We currently do not have any university technical colleges or studio schools.

Maintained Schools

Maintained schools are funded by the local authority. Whereas formally they are run ("maintained") by the local authority, delegation of powers to the Governing Body means that they have many of the same responsibilities and powers as academies. These fall into four main categories:

€ Community Schools

Community Schools are controlled by the Local Authority and are not influenced by business or religious groups. There are 72 schools in this category in Northumberland.

• Voluntary Controlled Schools

Most Voluntary Controlled Schools, but not all, are Church of England Schools; there are currently 8 schools in this category.

• Voluntary Aided Schools

These are Foundation Schools with a Religious character and in Northumberland all are Church of England or Roman Catholic Schools. There are currently 23 schools in this category.

• Foundation Schools

These are Foundation Schools without a Religious character. Some Foundation Schools acquire a Trust and are known as Trust Schools. The Governing Body owns the building (unless there is a Trust in which case the Trust owns the building and land) and is the formal employer of the staff. There are currently 5 schools in Northumberland in this category.

Numbers and types of Northumberland Schools (not inc. independents)

Phase	Community	VA	VC	Foundation/ Trust	Academy / Free School	Total
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First	22	12	4	1	14	53
Primary	33	11	4	2	21	71
Middle	6	0	0	1	7	14
Age 9-18	1	0	0	0	0	1
High	1	0	0	0	4	5
Secondary	1	0	0	1	7	9
Special	7	0	0	0	2	9
Pupil Referral Unit	1	0	0	0	0	1
Total	72	23	8	5	55	163

There are now 55 academies and 1 free school in Northumberland. More schools have converted to become academies since the previous version of this document; for example a further 8 schools within the Prudhoe Partnership converted as the Tynedale Learning Trust in September 2019, while the RC Diocese of Hexham and Newcastle has established two academy trusts in the region with the expectation that all current RC academies will join and all RCVA schools will convert and join the relevant academy in their area by early 2022. So far St Matthew's RC Primary, St Joseph's RCVA Middle and St Mary's RCVA First have joined/converted to Bishop Bewick Catholic Education Trust, while the former Pax Christi academies and St Bede's RCVA Primary and St Wilfrid's RC VA Primaries have joined Bishop Bewick Catholic Education Trust. St Paul's RCVA Primary, Alnwick converted to the Bishop Bewick Trust in April 2021, with St Aidan's RCVA Primary, Ashington due to convert in 2021 and St Cuthbert's RCVA First, Berwick and St Robert's RCVA First, Morpeth joining them in April 2022.

There has been a reduction in the number of school closures since the last update of this document, with only the closure of West Woodburn First School in August 2020. Schools closed in the last five years since 2016 are set out in the following table:

Schools closed	Year/Date of Closure	Reason for closure	Closure proposed by	Closure approved by
Herdley Bank Primary School	August 2016	Unviable due to reducing pupil numbers	Governing Body	NCC
James Calvert Spence, South Avenue (middle)	August 2016	Amalgamated with James Calvert Spence, Acklington Road to become age 9-18 all-through school	Governing Body	NCC
Seahouses Middle School	August 2017	Alnwick Partnership reorganisation to primary/secondary system	NCC	NCC
The Dukes Middle School	August 2017	Alnwick Partnership reorganisation to primary/secondary system	NCC	NCC
Lindisfarne Middle School	August 2017	Alnwick Partnership reorganisation to primary/secondary system	NCC	NCC
St Paul's RC VA Middle School	August 2017	Alnwick Partnership reorganisation to primary/	Governing Body	NCC

		secondary system		
St Benedict's RCVA Middle School	August 2017	Reorganisation of Ashington RC schools to primary /secondary system	Governing Body	Schools Adjudicator
St Peter's Catholic Academy	August 2017	Reorganisation of Cramlington RC schools to primary/ secondary system	Academy Trust	Secretary of State
Acklington CE First School	August 2018	Closure of school due to viability issues	Governing Body	NCC
St Mary's CE Middle School, Belford	August 2018	Closure of school due to viability issues	NCC	NCC
Netherton First School	August 2018	Closure of school due to viability issues	NCC	NCC
West Woodburn First School	August 2020	Closure of school due to viability issues	NCC	NCC

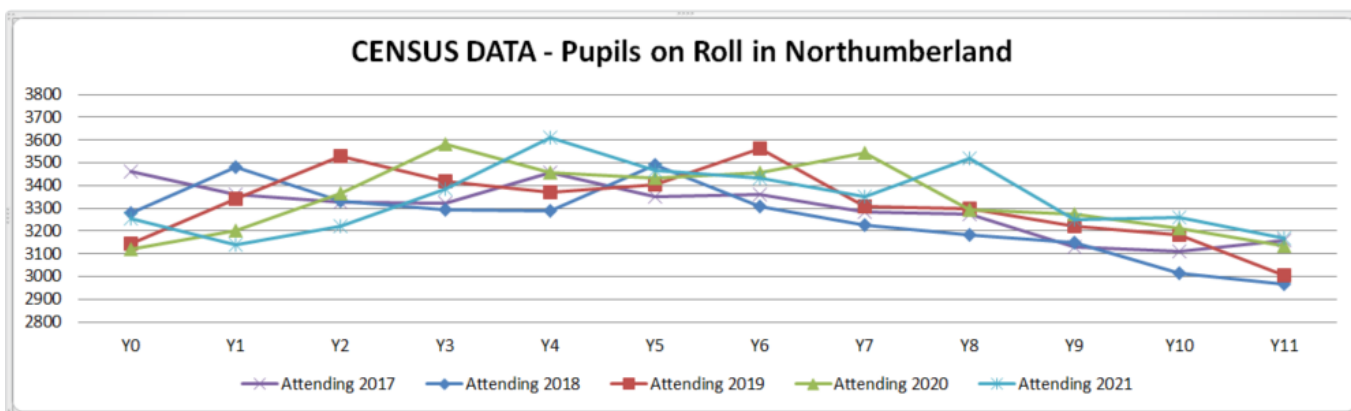
Current, future or proposed future changes to the organisation of schools in individual partnerships are set out in Section 2.

2.4 Number of pupils on roll in schools and academies in Northumberland, surplus places and inward migration

There were a total of 38,995 children and young people of statutory school age (Reception to Year 11) on roll in all types of schools (excluding Special and independents in Northumberland as at October 2020. This represents a fall of 2% compared to the previous year; while this level of fluctuation is not unusual over time, this is the lowest number of pupils on roll in these year groups in the past 5 years. However, this masks a considerable variation between school partnerships as some, mainly in the urban towns and villages in the South East have experienced growth in numbers due to increased birth rates and house building; there can also be considerable variation between individual schools within partnerships even in urban areas, for example when new housing is constructed or when estates mature and produce fewer children. Further information on pupil numbers and surplus places is provided in Section 4.2 and in the individual partnership sections of this document.

DfE data for 2019/20 indicates that just under 5% of pupils on roll in schools from Reception to Year 11 live in neighbouring authorities, mainly coming from Newcastle, North Tyneside and Durham. These pupils are able to attend Northumberland schools as a result of surplus places in popular schools e.g. some schools in Ponteland and Hexham Partnerships are particularly popular with parents in neighbouring Newcastle and Durham authorities respectively. The numbers on roll by year group from Reception to Year 11 over the last 5 years are given in the following table:

NORTHUMBERLAND	Y0	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10	Y11	TOTAL
Attending 2017	3461	3362	3325	3323	3459	3351	3360	3282	3274	3131	3109	3161	39598
Attending 2018	3281	3481	3333	3292	3289	3490	3306	3226	3183	3147	3015	2966	39009
Attending 2019	3145	3341	3531	3419	3372	3404	3564	3310	3296	3222	3185	3006	39795
Attending 2020	3122	3202	3364	3582	3456	3433	3457	3541	3292	3274	3210	3137	42880
Attending 2021	3255	3141	3223	3384	3609	3466	3434	3352	3519	3250	3259	3167	40059



3. DUTY TO PROVIDE SCHOOL PLACES

3.1 Local Authority duties and powers

Local authorities have a statutory duty under the Education and Inspections Act 1996 to ensure there are a sufficient number of school places within its area and that within such provision, parental preference, diversity and fair access are promoted. Our objective as a local authority is to work towards ensuring that there are sufficient 'good' places (as defined by Ofsted) available for all children and young people resident in the county within or as close as possible to their own communities.

This plan identifies where school places, including special school places, are required now and in the future and explains the mechanisms for providing these places. It also identifies where there are significant numbers of surplus places in the county and how some of the challenges that this poses may be addressed.

3.2 Challenges in delivering duties

The power of local authorities to influence how and where school places are provided within its area has been reducing for a significant number of years as a result of national policies. For example, local authorities have for some time been unable to open their own (community) schools, as every new school opened must now be a free school (effectively an academy).

Schools that are their own admissions authority (i.e. voluntary aided schools, academies and free schools) are able to increase their Planned Admission Numbers (PAN) without consultation, although they must notify the local authority when they do so. Therefore, one of the key roles of the Council is to maintain good working relationships with and between all types of schools to ensure that there are sufficient good school places available in the right places in the county, while balancing the desire of schools or academies to increase or reduce places into their own establishments, parental demand for places in successful schools and the impact of any changes on other schools to ensure a fair system for all.

3.3 Impact of Northumberland and National policies on school place planning

The provision of school places is not only influenced by statutory duties placed on the Council, but also by Northumberland's local policies and wider national policies.

Government policy in recent years has pushed for the conversion of ever more schools to become academies and as stated, the need for any new school identified by a local authority must be provided as a free school, which will effectively be an academy. Furthermore, where a school is judged to be inadequate by Ofsted, the school must become a sponsored academy, or in some instances, the Secretary of State may order the closure of the school. In the case of a school closure, the local authority would be under a duty to find alternative suitable school places for displaced pupils at other schools in the locality, and to manage any increased home to school transport costs if required. The overall impact of the reducing number of community and voluntary controlled schools in Northumberland means that the local authority's ability to influence where school places are created is diminishing.

The Northumberland Local Plan document is currently being prepared by the Council. It will include the planning policies that will be used to guide and determine future planning applications in Northumberland, detail the scale and distribution of new housing development and include land allocations and designations, which in turn can influence the growth of pupil numbers in the county.

The Northumberland Local Plan was submitted to the Secretary of State for Housing, Communities and Local Government on 29 May 2019 and is currently undergoing examination. The second phase of the public hearing sessions took place in October and November 2020. Following the close of these hearings the Council has some further work to carry out and submit to the Inspector. Following the submission and consideration of this work the Inspector will write to the Council setting out her preliminary conclusions on whether the Plan is sound or can be made so with modifications.

Any main modifications required to make the Plan sound will be consulted upon by the Council, together with the results of any further Sustainability Appraisal and Habitats Regulations Assessment which may be necessary. The responses to the consultation will be considered by the Inspector before she finalises her Report into the soundness of the Plan. Up-to-date information and documents relating to the examination can be found on the examination webpage.

- [Click here to view the Northumberland Local Plan Examination webpage.](#)

4. SCHOOL PLACE PLANNING

4.1 Current methodology

Forecasting the number of pupil place requirements within any local authority is not an exact science and therefore presents a challenge due to changing demographics in some areas, fluctuating parental preferences and new housing developments. These issues are in addition to the potential for academies and free schools to increase or even decrease (the latter with permission from the Schools Adjudicator outside of the normal consultation process) their available pupil places outside of the control of the Council.

In Northumberland, pupil forecasting is carried out at school partnership level. At its basis is the data received from the NHS on the number of children registered with GP surgeries. The Council is able to match the postcodes of these newborn children to individual school catchment areas, which provides a reliable indication of how many children are likely to enter schools in Reception classes. Once actual places are taken up within the school system, the year on year transition through the school system is assumed.

The forecasts are further refined as children enter and move through the system by including a weighting (based on previous trends) at phase change points. For example, as a result of parental preference in some school partnerships additional children may historically enter schools at a particular phase in Year 5 including, while in other partnerships, there may be a trend for a proportion of children to leave the partnership at the end of a phase change to take up places at popular schools in other partnerships. Parental preference also impacts on the movement of pupils in schools within their school partnerships and to other partnerships in the county; another factor of parental preference concerns inward and outward flows from other neighbouring local authorities. The impact of housebuilding (where it has been given planning permission) is also factored into the final pupil forecast (see para. 4.5 for further detail). The Council's calculation for pupil yield arising from house-building indicates there are just under 3 children generated per year group from every 100 houses built.

The Council works in partnership with schools and academy trusts to ensure that where the need for additional places is identified that suitable arrangements are put in place to address the need. The DfE collects school capacity and pupil forecasting data annually from the County Council (SCAP collection), which assists the DfE in allocating the Basic Need capital grant and in policy making relating to school place sufficiency and forecasting. While there was no SCAP collection in 2020 due to the impact of COVID 19, it is being resumed in 2021.

4.2 Managing Surplus Places

The definition of surplus school places is the number of school places that remain unfilled in a school compared to the total of number of places available (capacity), as measured by its available teaching and learning spaces. Surplus places are not related to the Planned Admission Number (PAN) of a school, which is the number of places a school offers in its entry class or classes i.e Reception, Year 4 (middle), Year 7 (secondary) or Year 9 (high school).

As at January 2021, there were 8,620 surplus places in schools and academies in Northumberland (Reception to Year 13 and not including special schools), which equates to 17% surplus places overall. However, this figure masks the considerable variation in surplus places at school partnership level, which are reviewed in section 7 of this report. Having surplus places within an individual school is itself not necessarily a negative situation, indeed it is preferable for schools to have a minimum of around 5% surplus places in order to facilitate an element of parental preference for school places and to enable the school to have some flexibility to offer places to children who may move into the catchment area outside of the normal entry point into the school.

However, where the number of surplus places within a school begins to impact on the ability of the school to provide a broad and balanced curriculum in terms of staffing levels, as well as maintain, heat, light and clean the school building, then it can be detrimental to the educational experience of children and can threaten the viability and sustainability of individual schools. Where there is over provision of places across a whole school partnership, parents can have excessive choice and schools begin to compete for pupils. This can lead to children undertaking longer journeys by car to schools that are more popular with parents, driving past other schools within their own communities on the way and also impacting negatively on the environment. The results of excessive surplus places has in the past in Northumberland led to some schools, particularly small rural schools, becoming unviable, having to close and thereby making it necessary for all children that may have been served by that school to undertake longer journeys for their education away from schools further from their home and village communities; in addition this will have impacted on the environment.

There is no magic formula for calculating the right amount of surplus places within Northumberland and there is no official maximum level of surplus places a local authority should aim to maintain, although the Council is challenged regularly by the DfE on its arrangements for managing surplus capacity. Northumberland County Council aims to have a 3-point approach to the management and rebalancing of surplus places in the county:

1. At a strategic level in relation to the whole county, whereby oversight of the total number of surplus places is reviewed as part of this plan as an annual reference point to inform officers, interested parties, and the DfE;
2. At school partnership (planning area) level firstly when surplus places are reviewed annually as part of this plan or secondly, reviewed as part of partnership-wide school organisation project. This often leads to specific proposals for individual schools (see below).
3. At the individual school level when specific actions are proposed to address the impact of surplus places, such as outcomes of a partnership-wide school organisation review, or where the school's viability or its ability to carry out effective staff planning impacted by excessive surplus places, or where the number of places available at a school far exceeds the needs of its own community, which is impacting the viability of other schools and the environment by encouraging increased car journeys;

Any proposals based on the approaches to rebalancing surplus places above will be driven by the following principles:

- Length of journeys to school for primary and secondary pupils to be no longer than DfE guidelines unless it is absolutely unavoidable due to specific local circumstances;
- Linked to above, decisions support schools remaining as close to pupils home communities as possible, particularly in relation to rural areas;
- Reducing impact on viability of other local schools;
- Reducing impact of car travel on the environment, specifically in relation to support of the Council's Climate Action Plan - 2021-23

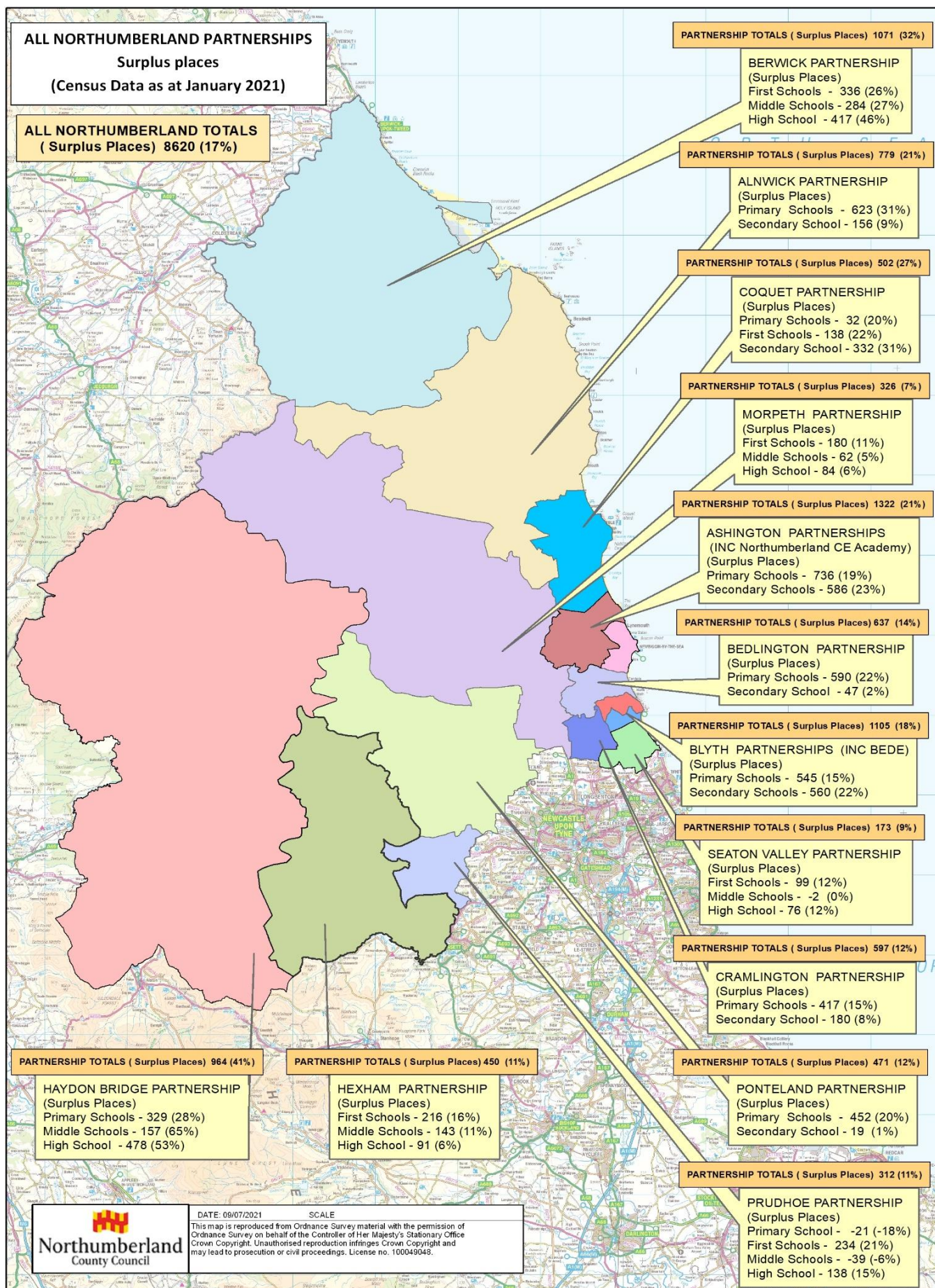
At the partnership level, where pupil numbers within a whole partnership are falling year on year, there may be occasions when there is simply an over-provision of schools and the closure of one or more may be the best interests of the long-term sustainability of the whole partnership. Any proposals to remove surplus places through the closure of schools must be balanced with the desire to provide schools within reasonable distance of pupils, especially younger children. Proposals for school closures at the partnership level generally occur as a result of whole partnership educational organisation review. It should be noted that statutory legislation limits the power of local authorities to approve the closure of local authority maintained schools only; local authorities do not have powers to close academies.

Outside of a whole partnership organisation review, will be an assessment of the impact of surplus places across whole school partnerships as part of this plan. This may lead to the reduction of the Planned Admission Number (PAN) of a particular school or schools within to a level that provides enough places to serve its local community, while offering a level of flexibility for parental preference that does not impact detrimentally on other schools. Any proposal by the Council to reduce the PAN of a school would be based on the forecast pupil numbers for that school and would be limited statutorily to community and voluntary controlled schools only and subject to necessary consultation as required by the Admissions Code 2021. While the reduction of a school's PAN would not actually remove any physical capacity from the school and therefore the 'surplus' would remain, the opportunity for schools to impact negatively on each other would be reduced and there would be considerable benefit to the environment through the reduced number of car journeys, thus supporting the Council's Climate Change Action Plan 2021-23. On the other hand, where a school has a PAN appropriate to its community, but is not able to attract enough pupils to plan its staffing or class organisation effectively due to parental preference, there may be a stronger rationale for that school to reduce its PAN, subject to their being no other negative impact such as an increase in car journeys.

Where the Council identifies that an academy or voluntary aided school has excessive surplus places to the point where it is negatively impacting on other local schools, officers will discuss the situation with our relevant partner Admissions Authorities to identify a solution. However, the Council has no powers to reduce (or increase) the PAN of academies, voluntary aided or foundation schools.

The impact of decisions made outside of the control of the Council have also had an impact on increasing the level of surplus places; for example, the decision of the School's Adjudicator in 2018 to overturn the Council's approval of the closure of Bellingham Middle School has meant that the level of surplus places in the Haydon Bridge Partnership remains high (the school has a capacity of 240 with only 84 pupils on roll), while the Regional Schools Commissioner approved the change of age ranges of Ponteland Academy and Meadowdale Academy effective from September 2020, thereby increasing surplus places in the primary phases of the Ponteland and Bedlington Partnerships respectively. The number of surplus places by phase within each school partnerships is given at Appendix 1 attached to this report. Surplus places at partnership level are reviewed in section 7. The following map identifies the level of surplus places in each school partnership as at January 2021.





4.3 School Admissions

By their nature, school admissions arrangements and school place planning are closely linked. The management, consultation and publication of school admission arrangements are a legislative requirement of all Admissions Authorities, including Academies, and guidance is set out in the new School Admissions Code 2021 which came into effect on 1 September 2021.

Northumberland County Council is the Admissions Authority for all community and voluntary controlled schools within the county. One element of legislation, set out in the Admissions Code, is that parents must be able to express a preference for a place for their child at any school, and where a place is available it must be offered, no matter where the child is resident. While this is a benefit to parents, the impact on many schools in Northumberland, particularly those in rural areas, is that they have less reliable annual intakes than urban schools and are more vulnerable to events that impact on their popularity, such as poor Ofsted judgements or a neighbouring school receiving an 'Outstanding' Ofsted judgement. This in turn can make forecasting at the individual school level more difficult.

Northumberland schools are organised within 'partnerships' to ensure a clear pathway through a child and young person's educational journey. In the remaining 3-tier partnerships, this pathway follows from first school to middle school to high school, while in the primary/secondary partnerships the pathway begins in primary school and follows on to secondary school at age 11. The Council allocates a catchment area to every school or academy, except in circumstances where a school or academy exists outside of the prevalent educational pathway within the relevant partnership. The catchment area is a defined geographical area from which a school will expect to take children and assists the Council in ensuring that schools and academies have variable numbers of children living within it, and to assist with the organisation of Home to School transport eligibility. However, the application of parental preference and the existence of surplus places in schools means that even with catchment areas in place, there is considerable movement of children across catchment boundaries in some areas of the county as parents select to send their children to schools that are not then identified catchment school.

The catchment area of the high or secondary school in any partnership contains all of the feeder schools' catchments within it and is referred to as the 'greater catchment area'. The Council's oversubscription criteria for community and voluntary schools after the allocation of places to pupils with an Education, Health and Care Plan and 'looked after' children are as follows:

1. Children living within the catchment area of the school.
2. Children with an exceptional social or medical reason that means that they can only attend that specific school.
3. Children resident in the greater catchment area of the school partnership who have siblings already in the school and who are expected to be on roll at the school at the time of admission who live within the greater catchment area of the school partnership.

4. Children resident in the greater catchment area of the school partnership who are expected to be on the roll at the school at the time of admission.
5. Children who have a sibling who already attends the school and who is expected to be on roll at the school at the time of admission.
6. Children on whose behalf preferences are expressed on grounds other than those outlined above.

Academies and voluntary aided schools are able to set their own admissions criteria which in some cases differ from the Council's admissions criteria and can impact on the ability of catchment children to gain a place at their catchment school.

Northumberland County Council has a very high success rate in meeting parental preference in relation to first choice of Reception places in first or primary schools and middle, high and secondary schools. For places allocated in September 2021, the percentage of first preference places met was as follows:

- **Reception First preferences allocated = 98.43%**
- **Secondary/Middle/High First preferences allocated = 97.60%**

While overall this measure is an indicator of a high success rate in meeting parental preference, it may also indicate that in some areas of the county there are high surplus places enabling parental preference to be met at this level (refer to section 4.2 Managing Surplus Places).

4.4 Home to School Transport

Northumberland County Council is responsible under legislation for the management and funding of home to school transport in the county. Generally, children of statutory school age who meet the criteria in relation to distance to school (ie who live further than 2 miles up to age 8, or 3 miles age 8 and over from their catchment or nearest school or where there is no safe walking route) are provided with transport to their catchment, nearest or nearest faith school where that is a parental preference. Pupils whose parents have expressed a preference for a school that is not their catchment, nearest or nearest faith school (where a place at a particular faith school has been allocated at the parent's request) will not be eligible for home to school transport.

The Local Authority spent almost £10m per year on fulfilling its statutory duties as set out in its home to school transport, up from circa £8m reported in the previous version of this plan, a significant element of this increase has been due to incurring higher costs procuring additional transport as a response to COVID-19.

This figure will rise in the financial year 2021/22 with the introduction of a revised post-16 transport policy which now includes free transport to post 16 learners. Therefore, the policy intention of the Council's school transport policy is to support children to attend schools in their locality.

4.5 House Building

The provision of quality education is at the heart of sustainable communities and therefore is a fundamental consideration of all new housing developments. Where a new housing development is forecast to create a demand for school places in excess of those available in the catchment area of the development, the local authority will seek an education contribution from developers that reflects the likely costs of the additional places required. To that end, the Council has an Education Infrastructure Policy, included as Appendix 2 of this document. In August 2020, the Government initiated a consultation 'Planning for the Future' with a view to bringing in reforms of the planning system to streamline and modernise the planning process, bring a new focus to design and sustainability, improve the system of developer contributions to infrastructure, and ensure more land is available for development where it is needed. The outcome of this consultation has not yet been published but the paper set out a proposal to revise the process by which developer contributions are secured and suggests that this process is incorporated within the overall Council Local Plan. The outcomes of this consultation and the consequent implementation of changes are still awaited.

Currently, the Council's secures educational infrastructure contributions via Section 106 of the Town and Country Planning Act 1990 and is consistent with Northumberland County Council's obligation to ensure that every child living in the county is able to access a mainstream school place if they want one. It is accepted that there are limitations on the use of planning obligations and these may only be used where the obligation is:

- Necessary to make the development acceptable in planning terms
- Directly related to the development; and
- Fairly and reasonably related in scale and kind to the development.

If it is found that insufficient school places exist, an appropriate level of contribution will be calculated that takes due account of:

- The size of the development;
- Current and forecast school numbers;
- Likely pupil yield at primary and secondary level, as well as yield of pupils with Special Educational needs who may need a place at a Special School;
- The need to manage capacity and retain some flexibility in the system;
- Local and national information in relation to cost factors for the respective type of pupil places;
- Outstanding developments in the partnership area for which planning permission has already been granted.

The impact of each proposed planning application on local schools is assessed individually and the existence of surplus places in other schools in the relevant school partnership does not preclude the possibility of a request for a contribution towards educational infrastructure where the Council believes data warrants it. Likewise, the impact of housing development in neighbouring partnerships to that where a planning application is put forward will also be taken into account when predicting pupil flows; this could mean that while surplus capacity may currently exist in a school, the impact of the planning application development combined with housing development in surrounding areas could mean that additional capacity would be

required at local schools within the timeframe of the build-out period and therefore developers should be requested to contribute to the costs of providing additional places or educational infrastructure. Northumberland's 'Five Year Housing Land Supply of Deliverable Sites' is used as part of the analysis of the impact of planning applications to provide a strategic view of the likely impact; this is in line with DfE requirements and recommendations.

Further information on how developer contributions are assessed and requested is available in the Northumberland County Council Education Infrastructure Policy provided at Appendix 2 of this document.

The level of approved planned housebuilding across the county over the next 5 years varies considerably between school partnerships, although generally there is less housebuilding planned in the rural West and North overall, with the majority of new housing planned for the more urban South East. The following table shows how many dwellings are currently planned to be constructed in each partnership between 2021/22 and 2025/26:

Partnership	No. Dwellings planned for construction 21/22-2025/26
Alnwick	780
Ashington	467
Bedlington	321
Berwick	517
Blyth and Bede combined	671
Cramlington	782
Coquet (Amble)	668
Haydon Bridge	100
Hexham	408
Morpeth	1,378
NCEA (Hirst, Newbiggin, Lynemouth)	587
Ponteland	257
Prudhoe	277
Seaton Valley	185

The impact of the above planned housebuilding on schools within these relevant partnerships will vary between partnerships considerably, as in some cases the number of pupils generated from new housing will simply help to stall the effect of falling pupil numbers in those areas, whereas in other partnerships additional places may need to be created. The number of houses constructed at any one time will also be a factor in the impact on schools, as some will experience 'bulge' years where expansion of accommodation for additional pupils is only required for a limited number of years. Further information on the impact on individual partnerships is set out in Section 7.

4.6 Inter-partnership and inter-authority movement of pupils

There has been a historical movement of pupils into and out of certain school partnerships, usually at phase changes, which is factored into pupil forecasting as stated in 4.1. Some of the inward flow into certain partnerships includes pupils from neighbouring local authorities' areas e.g. Durham and Newcastle. As stated in section 2.4, the DfE have published data for

2019/20 on cross-border flows and this indicates that just under 5% of pupils on roll in schools from Reception to Year 11 live in neighbouring authorities, mainly Newcastle, North Tyneside and Durham; this matches the Council's own previous data on this measure.

Although the law places a statutory duty on local authorities to provide places for children resident within their own boundary, some schools in Northumberland benefit greatly from the inward flow of out of county pupils, and indeed would not be educationally or financially viable did this not occur. For example, for 2019/20 Ponteland Partnership had by far the largest inward migration of pupils; of the 3,151 pupils on roll in Ponteland schools (not including sixth form), 1,398 (44%) live in other local authority areas, mainly Newcastle.

While this movement of pupils in and out of partnerships is generally consistent over time and therefore predictable, certain events such as a school reorganisation can trigger 'new' outward and inward flows that must be monitored in order to analyse the impact on the affected schools, such as adjustments to forecasting weightings and, if necessary, consider the need for additional places. For example, the recent reorganisation of the remaining first schools in the Haydon Bridge Partnership to primary schools in September 2019 will take some time to become embedded and for parents to adjust to the new arrangements and perhaps reduce the flow of pupils into the Hexham Partnership.

5. CAPITAL DEVELOPMENT

The Council works with schools and academies collaboratively in order to ensure that sufficient school places for children and young people living in Northumberland are available where a need is identified. Where the provision of additional places is to be met via capital development, the Council applies a number of principles to such projects:

5.1 Principles

- Where relevant, designs include flexibility to allow for curriculum development and delivery and future population growth ('future-proofing');
- Collaborating with maintained mainstream schools and academies to provide sufficient places where there is a need;
- Maximising developer contributions to ensure that appropriate investment is made in education infrastructure;
- Working in partnership with contractors to deliver quality construction and efficiency in design and procurement;
- Scheduling significant capital projects to be ready in time to meet need or demand for places;
- Support the public purse by endeavouring to ensure value for money by minimising future liabilities for suitability, maintenance and flexibility;
- Deliver school buildings that will serve local communities for several generations and are designed to be sympathetic to the local area.

5.2 Funding

Capital projects can be funded through a variety of sources depending on circumstances including whether they are stand alone projects or partnership wide reorganisations. Key funding streams are:

- Section 106 funding from new house building developments; the DfE have identified this as the primary route through which funding for additional school places required as a result of pupil yield from new housing development should be sought, with the publication of their "Securing Developer Contributions for Education, April 2019"
- Basic Need Grant funding from central government based on identification of need for places in specific schools and partnerships; in the light of the above, this would be relevant mainly in the case of rising birth rates or inward movement of populations not related to new housing.
- School Condition Allocations from central government;
- Capital contributions from individual school budgets (DFC) or through collaboration with academies that are granted funds from Condition Improvement Funding.

5.3 Methods

The Council has approved capital schemes to accommodate additional school places by:

- **Extending schools by adding classrooms** or reconfiguring existing spaces; where the need for additional places at some schools have been forecast to be permanent and not just a one-off 'bulge year', capital schemes have been undertaken to provide classroom

extensions or reconfiguration. This has also applied where school reorganisations have taken place, such as Alnwick and Ponteland Partnerships, and additional classrooms have been required to accommodate new Year 5 and Year 6 groups.

- **Provision of new buildings;** Most recently as part of the reorganisation of the Ponteland Partnership, the option appraisal exercise for provision of accommodation to support the process has identified the provision of new shared accommodation for Ponteland High School and Ponteland Primary School as the most cost effective and educationally preferable route. The new school buildings form part of an education and leisure complex and are now under construction in compliance with Building Bulletin 103.

5.4 Working with Partners

The Council works with a range of partners to deliver suitable accommodation for additional school places:

- Headteacher and Governing Bodies
- RC and CE dioceses
- Academy trusts
- Regional Schools Commissioner, EFA and DfE
- Town and parish councils
- Housing developers
- Local communities

5.6 Capital Projects completed

Capital projects completed in the timeframe since 2019 include the following:

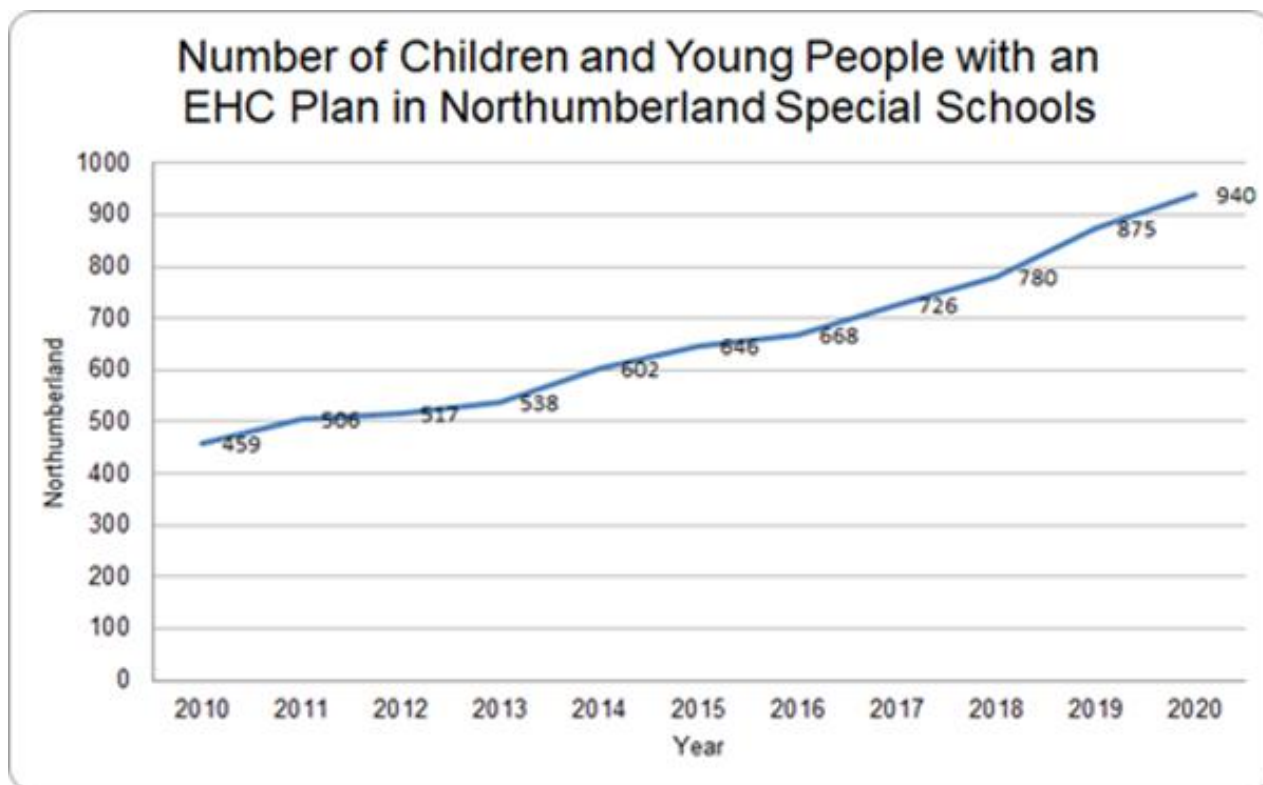
- Delivered capital projects, with a total capital investment of £37.8m, since the Covid pandemic.
- Ponteland scheme - Successfully handed over phase 1 Ponteland Schools and Leisure scheme.
- Hexham scheme - Successfully handed over Hexham Academies Scheme.
- Haydon Bridge High School – massively expanded scope of works delivered within budget.
- St Benet Biscop – delivered to budget and within 3 months ready for the new academic year.
- DfE Grant funded nursery schemes at CVP and Morpeth Road – both schemes delivered to budget and complicated funding passport arrangements set up.
- 16 projects completed under the SCIP scheme, across the county, totaling approximately £1.8m.
- ARP schemes – Astley and Seaton Sluice schemes delivered to very tight programmes.
- Stannington First School expansion – delivered to programme.
- Bedlington West End Primary School – successfully delivered to budget.
- Seaton Valley Federation proposals to relocate Seaton Sluice Middle School to join Astley High School and Whytrig Middle School in new buildings at the Astley site - Outline Business Case complete and awaiting Cabinet approval to move forward to next consultation on relocation.
- Programme for delivery of Mobile Classroom provision in roll-out stage.
- Funded additional accommodation at Newminster Middle School and worked in partnership with 3 Rivers Trust to deliver for September 2021.

6. NON-MAINSTREAM PROVISION

6.1 Special Educational Needs

Overview

In Northumberland, the number of children and young people who have been diagnosed as having Autism, Social Emotional and Mental Health needs has been increasing, with Significant additional capacity in the county's 9 special schools being required year on year for the past 10 years, as demonstrated in the graph below:



Overall, this steady upward trend in demand for special school places equates to an average increase over this period to date of 7% each year (actual variation from year to year has been between 2% and 12%). There continues to be an increasing demand from parents for their children to be educated within special school provision both in and out of the county. It is also widely acknowledged nationally that there are significant financial pressures on mainstream schools in supporting SEND provision, not least due to school budget pressures and expectations on schools to fund the first £6k of support for each SEND learner with an EHCP.

The following table highlights the increasing numbers of pupils with SEND that attend special schools in Northumberland. In addition, the local authority has seen an increasing number (6% since January 2019) of placements at independent and non-maintained special schools.

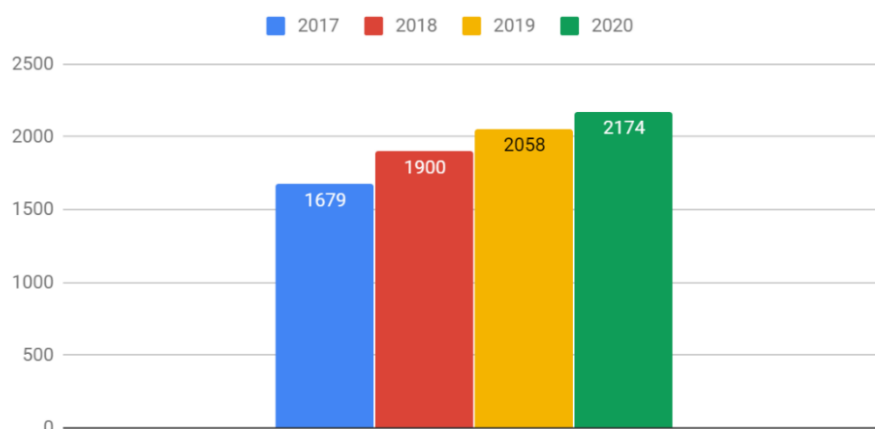
	2015	2016	2017	2018	2019	2020
Atkinson House School		56	59	64	73	70
Barndale House School	1	36	38	40	37	37
Buzz Learning		13	16	16	31	27
Cleaswell Hill School	1	160	173	175	181	187
Collingwood School & Media Arts College		136	137	146	143	162
Cramlington Hillcrest School		61	73	80	88	92
Dilston College		12	26	16	3	2
NCEA Castle School					102	91
Northumberland Pupil Referral Unit	9	1	2	9	12	10
Nunzykirk School		8	10	27	45	41
The Dales School	1	75	88	88	97	140
The Grove Special School		39	39	39	37	39
Grand Total	12	597	661	700	849	898

(Source: SEN2 and School Census Jan 2020)

Within these numbers, there has been a significant increase in the number of children and young people who have been identified with a primary special need of autism and/or social emotional and mental health needs. Northumberland has been successful in bidding for a special free school, the Gilbert Ward academy, for secondary age young people who have autism and social, emotional and mental health needs which is planned to open in 2023.

As at the January 2020 SEN Census, 2,174 children and young people had EHCP plans; this is an increase of 6% on 2019. Nationally, the increase in EHCPs allocated is larger at 10%.

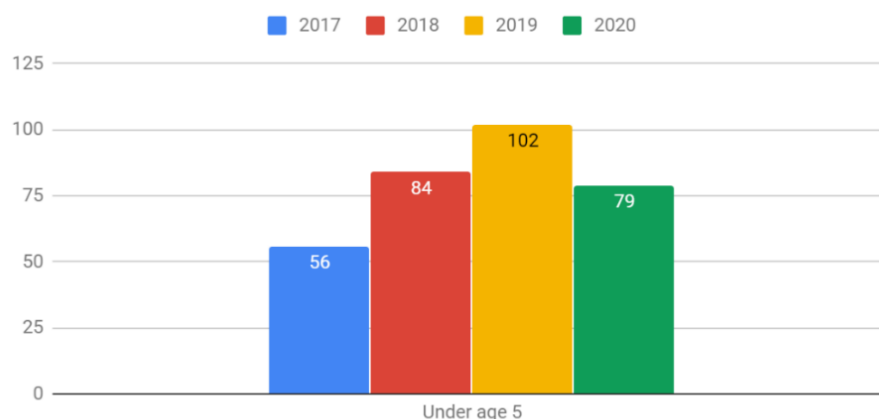
All pupils for whom the authority maintains a statement of special educational needs or an EHC Plan



The number of children aged under 5 with an EHCP has decreased. In Northumberland 4% of children with an EHCP are under the age of 5 equalling the National picture (see following graph).

Number of pupils for whom the authority maintains a statement of special educational needs or an EHC Plan

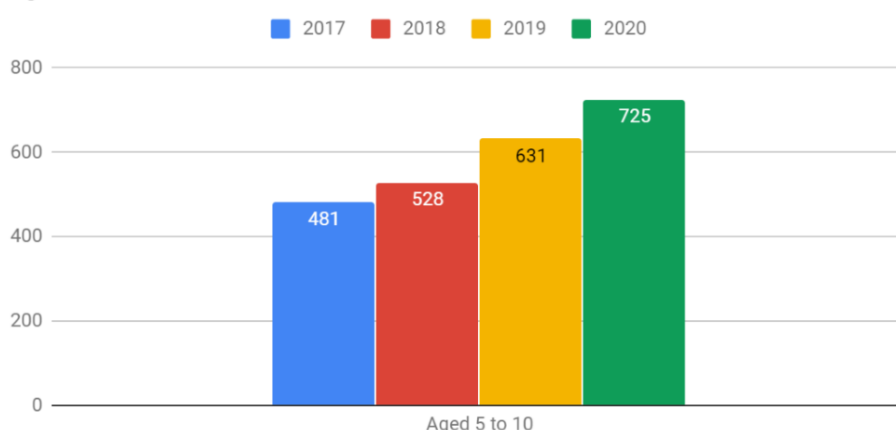
Under age 5



Children in the 5 - 10 age group have shown an increase of 14.9% compared with 9.8% Nationally (see graph below).

Number of pupils for whom the authority maintains a statement of special educational needs or an EHC Plan

Aged 5 to 10

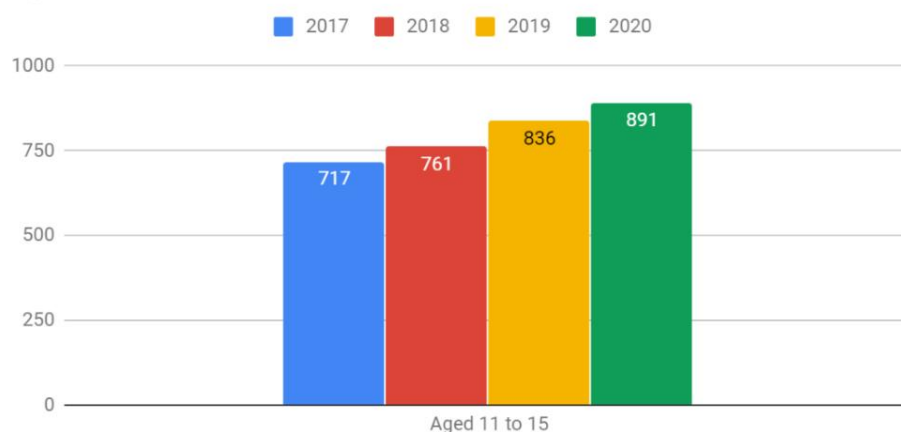


In recent years, there has been pressure for special school places for pupils due to transfer to secondary school and this has resulted in the Local Authority requiring to increase capacity at short notice.

The 11 - 15 age bracket account for the largest number of children and young people with an EHC plan as at January 2020 - a 6.6% increase on the previous year, compared with a 9% rise nationally.

All pupils for whom the authority maintains a statement of special educational needs or an EHC Plan

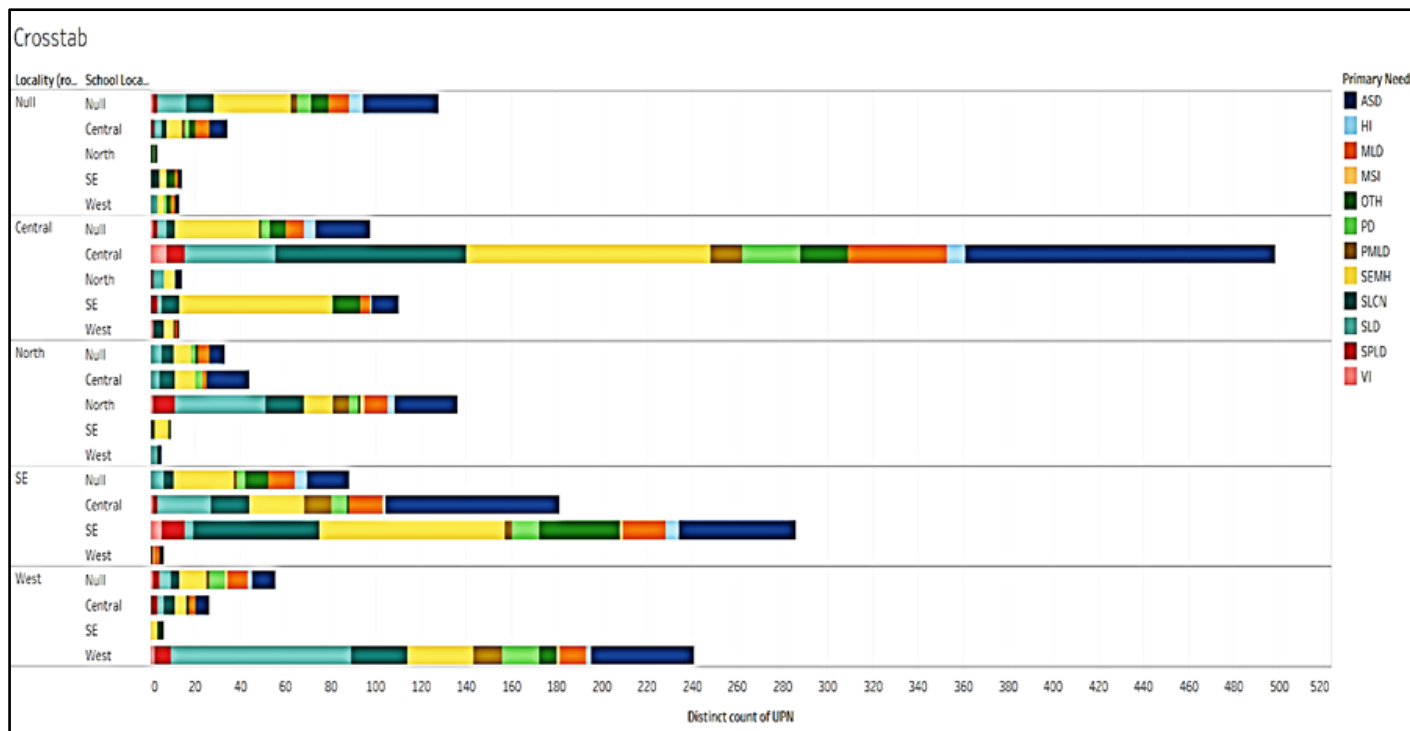
Aged 11 to 15



Specifically in relation to the age 5-10 group and the age 11-15 group, some of the increase in allocation of EHCPs is due to the fact that the Council no longer has top up funding (provision of funded support in school without an EHC needs assessment or EHCP), as this has been replaced with STAR (Short Term Additional Response) funding, which is time limited. Those with top up funding are being reviewed, where the decision will be made whether to cease funding or apply for an EHCP. Another factor is the increase in demand from schools for additional funding, driven by pressures on school budgets. However, the while there are far fewer children in mainstream schools with EHCPs in the primary phase than in the secondary phase, the gap appears to be closing.

There has been a slight decrease (1.4%) in the number of EHCPs allocated in the age 16-19 age group from 2019 to 2020, while in the age 20-25 age group, Northumberland continues to buck the national trend with a fall in the allocation of EHCPs.

A particular issue within the context of the size of Northumberland and the location of specialist provision, are the distances that many children with SEND have to travel to attend suitable provision. The following graph shows where children on roll in a special school in Northumberland live compared to where they have to travel for their education (see following graph):



The graph above shows in which area of the County (North, Central, South East and West) children with an EHCP on roll in mainstream and Special Schools reside compared to where they travel to receive their education. For example, the majority of children resident in the Central sector of the County with an EHCP receive their education in the Central and South East areas, therefore have the shortest journeys to school. Relative to the total number of children with EHCPs living in the west of the county, more have further to travel either to other areas of the county or out of county. The proportion of children denoted with 'null' in the above graph shows those children living in the various parts of the county who are educated out of county.

Additional SEND Provision

In late 2017, the Council consulted on its Vision and Strategy for children and young people with SEND for 2017 to 2020 which formed the basis of the [Northumberland SEND Strategy 2018-2020](#). A new draft strategy draft Strategy is due for consultation from January 2021.

In light of the increasing number of children with SEND in Northumberland, part of the consultation in 2017 included proposals for growing specialist provision within Northumberland to ensure children with SEND are educated close to home in high quality education establishments in order to inform place planning strategy. As part of the 2018/20 strategy, capital works have been carried out to increase SEND capacity in Northumberland as part of the SEND strategy which include the following:

- A capital scheme was undertaken to provide 50 special education places at Ashdale, a satellite site of The Dales School, Blyth; this high-quality unit was developed in a former sixth form provision and was nominated for an industry recognised building award.

- A capital scheme has provided 32 places at Hexham Priory Academy School through expansion on the current site, creating a further 32 places for local children.
- A capital scheme to provide an Additionally Resourced Provision (ARP) has been completed at Astley High School, with specialist provision now on site for up to 10 students with ASD and those with emotional vulnerability needs from early in 2021.
- A capital scheme to provide an ARP at Seaton Sluice First School has now been completed with provision for up to 12 pupils aged 4-9 with a broad range of needs, including ASD, Communication and Interaction, and Moderate Learning Difficulties.
- The new ARPS will assist with higher number of students with SEND on roll in mainstream schools in the Seaton Valley Partnership and neighbouring partnerships.
- The Council submitted a successful bid to the DfE for the establishment of a free special school in Blyth that will provide 80 places for children aged 11-16 with social and emotional mental health issues (SEMH) and autistic spectrum disorder (ASD) and this has been successful. The initial proposal is that 50 of these places would be allocated to children resident in Northumberland, with 10 places each allocated to children resident in the North Tyneside, Gateshead and Newcastle council areas. Prosper Learning Trust is the sponsor for the new Gilbert Ward School as it will be, which is now planned to accept pupils from September 2023.

To increase provision for SEMH pupils ahead of the opening of the new free school, approval from Cabinet is being sought to relocate Atkinson House school to a larger building and at the same time expand its provision from a single school to a co-educational school; it is hoped that this will be approved to be in place for September 2022. In addition, work will also be taking place in Autumn 2021 to identify the further capital projects to increase provision across the county for children and young people who have been identified with ASD and SEMH as their primary need. This programme of works will support the Council's aim of providing suitable SEND provision within the county as close to the home communities of these young people as practicable in order to reduce their journeys to school. There will also be financial and environmental benefits of reducing the number of out of county placements. This work will be supported by more accurate SEND forecasting, as referenced below.

SEND Place forecasting

A key focus of work for the School Organisation Team is to support the identification of need for specialist provision and consequential capital expansion projects within Northumberland through improvement in forecasting processes.

The process used for mainstream pupil forecasting, which uses past pupil numbers and planned housebuilding to predict future pupil numbers, is also being adapted for use with SEND data and this will be refined in 2021 using other available data and information such as the survey referenced above to offer more reliable forecasts. The current forecasts by year group for pupils with ASD as a primary need and pupils with SEMH as a primary need are included below. As these forecasts are limited to current data and do not include the potential impact of future interventions or strategy, they are at the moment limited to a five-year forecast and are to be used as guidance on potential future numbers.

ASD – 5 year forecast to 2025

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	Totals
Actual Jan 2021	35	37	51	56	65	80	91	71	86	74	76	75	21	24	842
2022	36	41	50	66	70	79	95	95	82	101	84	80	36	18	933
2023	34	43	55	64	81	84	93	99	109	95	113	87	38	31	1026
2024	34	40	57	70	79	98	100	97	113	127	107	119	42	32	1114
2025	34	40	53	72	87	95	115	104	111	132	143	112	57	35	1188

SEMH – 5 year forecast to 2025

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	Totals
Actual Jan 2021	49	79	99	117	145	187	187	170	166	137	127	115	22	8	1608
2022	50	80	105	117	129	148	192	180	176	154	123	114	21	12	1602
2023	49	80	106	123	128	131	152	185	187	163	138	110	21	12	1587
2024	49	80	107	124	135	131	135	147	192	173	147	123	20	12	1575
2025	49	80	106	125	136	138	134	130	152	177	155	131	23	12	1549

The next phase of forecasting over the next few months will move from the county level to the school partnership level, which will support the capital programme to provide additional suitable SEND places in the areas of the county where it is most needed. As stated previously, this will retain children and young people in education as close to their own home communities as possible.

6.2 Post-16 provision

Local authorities are required to ensure that all young people in its area continue in education or training until at least their 18th birthday. The Council has broad duties to encourage, enable and assist young people to participate in education or training. Specifically, these are to -

- secure sufficient suitable education and training provision for all young people in our area who are over compulsory school age but under 19 or aged 19 to 25 and an Education and Health Care Plan is maintained. This is a duty under the Education Act 1996. To fulfil this, the Council needs a strategic overview of the provision available in the county and to identify and resolve any gaps in provision;
- provide support that encourages, enables or assists all young people aged 13-19 and between 19 and 25 for those with special educational needs and disabilities (SEND) to participate in education or training under section 68 of the Education and Skills Act (ESA) 2008.

In Northumberland, all high and secondary schools and academies have sixth form provision. The Council also seeks to support this duty by providing improved accommodation for sixth form students in high and secondary schools e.g. the new building for Ponteland High School includes state of the art accommodation for sixth form. Furthermore, the Council approved a new Post-16 Transport Policy implemented for 2018/19 which provides free transport to eligible students to enable them to access the closest relevant learning to their home address, although this of course has an ongoing impact on the Council's Home to School Transport budget.

6.3 Early Years provision

The Council is committed to ensuring that young children can access high quality early education and care in a range of provision in order to create a solid foundation on which to build and go on to succeed at school and in later life. The local market for early years provision is mainly dominated by the private and voluntary sector which varies in provision size, quality and type, although there are a significant number of schools and Children's Centres who equally deliver good quality similar early years provision within the county.

All schools and Ofsted-registered early years providers must adhere to the EYFS, which sets the standards for the learning, development and care of children from birth to 5 years old and which they are inspected against. The Council is committed to supporting early years provision across Northumberland.

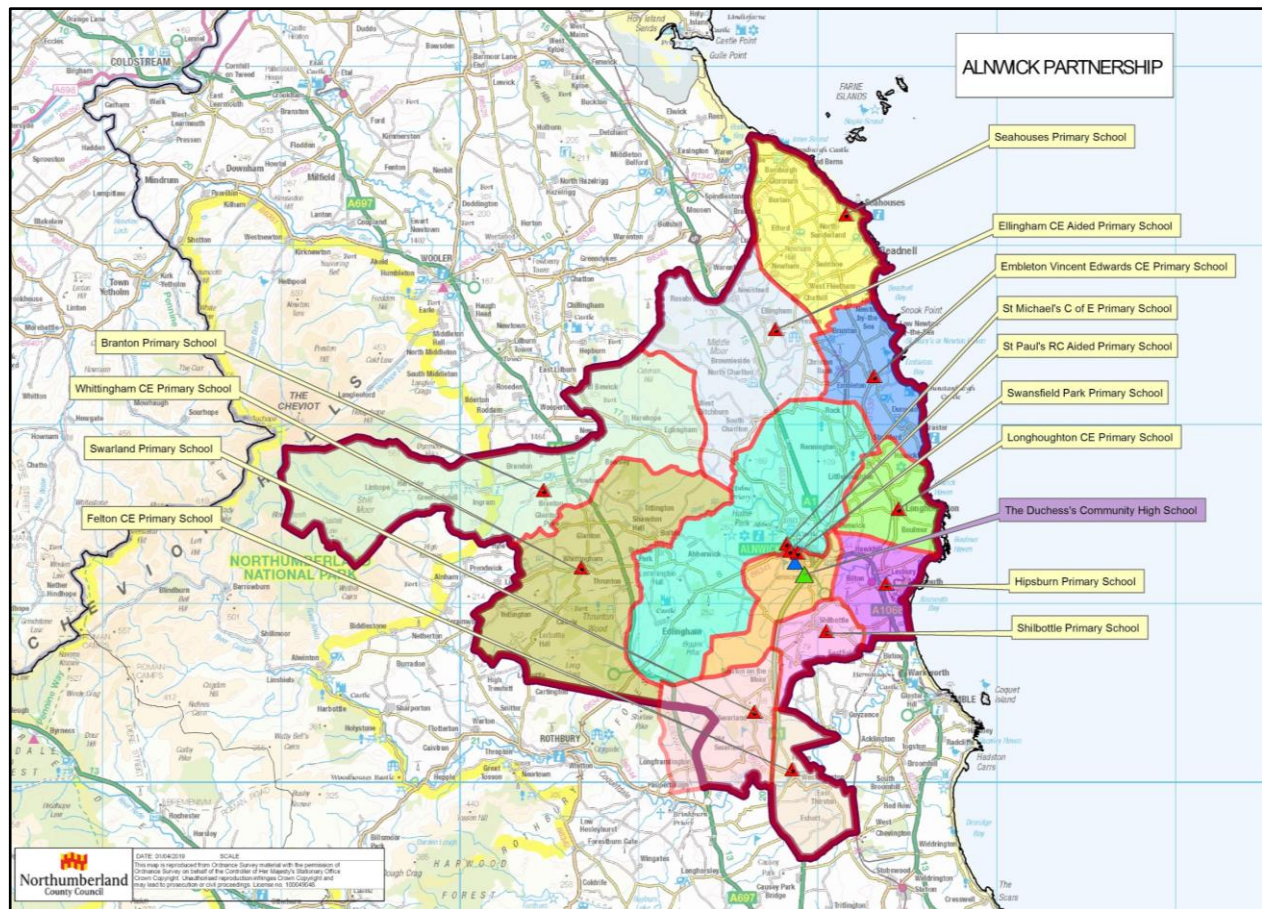
Early years education and care is delivered by 377 settings in Northumberland is delivered via:

- 174 Childminders (of which 132 deliver EYFS)
 - 95 groups offer Full and sessional Day Care, including 8 which offer out of school clubs (funded education)
 - 93 schools offer wrap around care
 - 16 Children's Centres
 - 52 Home Carers
 - 2 Creche

Of the above, 227 PVI's deliver the EYFS via funded entitlement, and 108 schools also deliver the EYFS.

7. SCHOOL PARTNERSHIPS (PLANNING AREAS)

7.1 Alnwick Partnership



The Alnwick Partnership is organised in the primary/secondary structure and is formed from the following schools:

- Ellingham CE Primary
- Seahouses Primary
- Longhoughton CE Primary
- Shilbottle Primary
- St Michael's CE Primary
- Swarland Primary
- Felton CE Primary
- St Paul's Catholic Primary
- Branton Primary
- Whittingham CE Primary
- Hipsburn Primary
- Embleton Vincent Edward's CE Primary
- Swansfield Park Primary
- The Duchess's High School

The majority of pupils who live in the Alnwick Partnership attend schools within the partnership, although significant numbers do not attend their own catchment school. Overall, the number of pupils being born in the Alnwick Partnership has been declining slowly over a number of years, although there are indications that decline could be beginning to plateau. There is some housebuilding in Alnwick over the next 5 years which will yield around 3 of 4 pupils in each year group in each of these years. Alnwick Partnership does benefit from cross-border flows of pupils into school both at primary with 9% of pupils crossing from neighbouring partnerships but even more at secondary phase where the percentage rises to 26%. As a result, the overall level of surplus places in Alnwick Partnership is 21%. While there is some housebuilding planned to be constructed in the greater Alnwick catchment over the next five years, its impact will be limited to a small number of schools and is only likely to reduce the impact of surplus places rather than require additional places to be created.

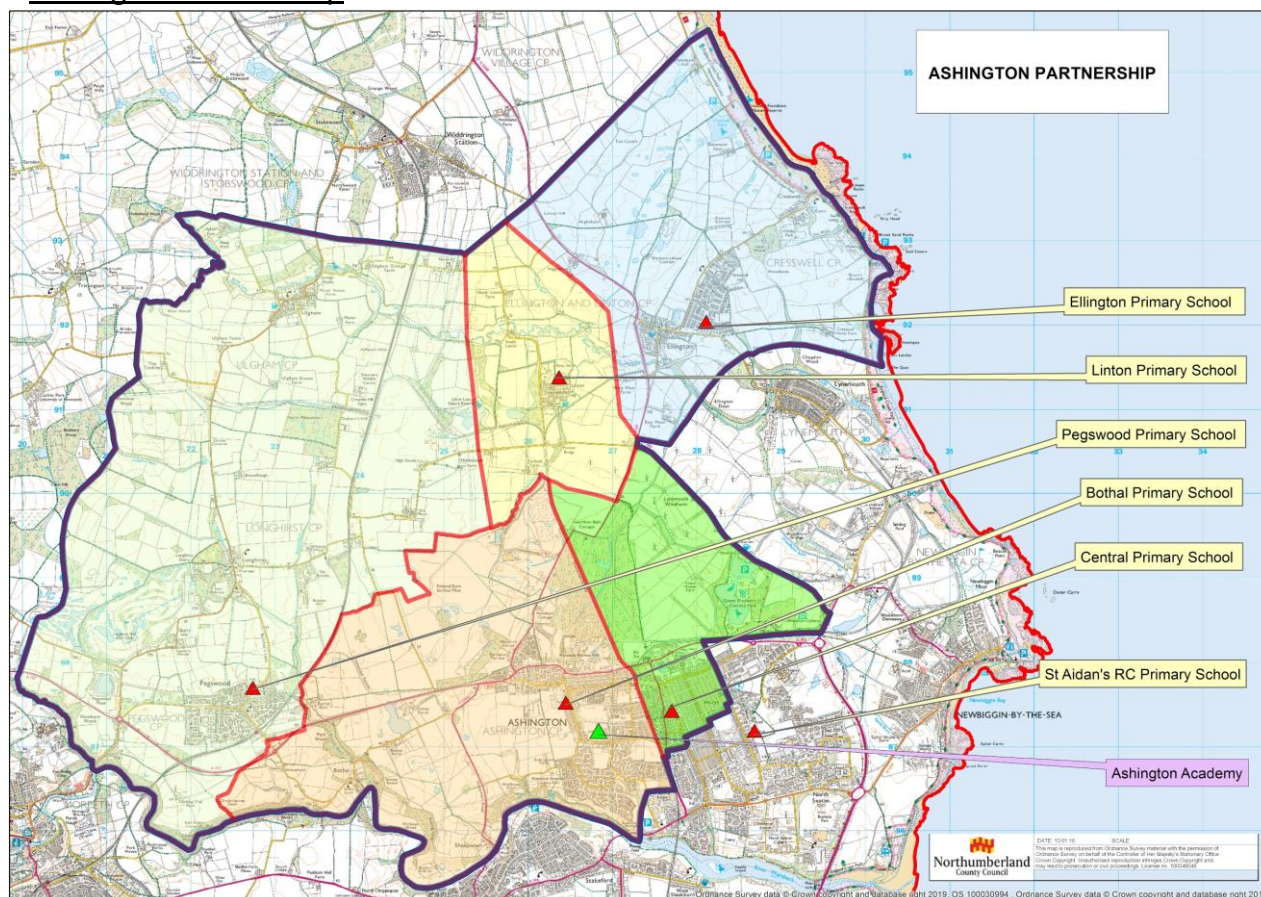
The majority of pupils crossing partnerships into Alnwick reside in Berwick and Coquet Partnership. Surplus capacity within the partnership over the coming years however is likely to have more impact in the primary phase. This will be particularly impactful on some individual schools in the partnership more than others. Therefore, in order to assist schools with managing their staffing plans and organisation of classes going forward, it is proposed that consultation on the reduction of PANs in a small number of schools should be undertaken as part of the annual consultation on admissions arrangements, subject to relevant approvals.

The Duchess High School continues to retain around 86% of the students living in its catchment area, and around 26% of students on roll live in neighbouring partnerships. The pupil forecast table below demonstrates that the primary phase will continue to have surplus places for the foreseeable future. There are sufficient places in the secondary phase at The Duchess for in-catchment children, although parental preference for out of catchment pupils may be reduced slightly as a consequence of approved house-building schemes in the partnership. It should also be noted that the outcomes of potential changes that may arise from consultation in the Berwick Partnership may impact on The Duchess, most likely resulting in a reduction of its surplus places.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	209	188	171	217	210	203	191	250	259	240	258	222	154	112	2884
2022	167	211	193	179	224	206	208	221	261	291	244	259	130	132	2925
2023	179	170	217	201	185	219	211	240	230	292	295	245	150	112	2947
2024	163	183	171	222	205	179	221	239	246	255	293	292	140	129	2938
2025	156	167	184	176	226	197	179	249	245	272	255	289	167	120	2881
2026	174	158	165	186	176	214	195	200	254	269	270	250	166	144	2820
2027	164	173	154	165	184	165	211	217	202	278	265	264	144	143	2729
2028	164	163	171	155	164	175	164	239	222	223	277	262	154	124	2656
2029	162	163	164	155	157	158	176	186	245	246	223	274	154	133	2595
PAN TOTALS	287	287	287	287	292	292	292	250	250	250	250	250	250	150	3674

Key: PAN - Planned Admission Number

7.2 Ashington Partnership



The Ashington Partnership is organised in the primary/secondary structure and includes the following schools:

- Bothal Primary
- Central Primary
- Ellington Primary
- Pegswood Primary
- Linton Primary
- St Aidan's RCVA Primary
- Ashington Academy

The latest GP birth data for Ashington indicates that once again numbers in the in the primary phase are fluctuating, with the latest trend slightly downwards. However, 32% of pupils who attend schools in the primary phase in Ashington reside in neighbouring partnerships, mainly the NCEA partnership, which given its proximity to Ashington is not surprising.

Some primary schools in the Ashington Partnership have suffered from drift at the end of Year 4 .e.g Pegswood Primary, as many parents choose to send their children to popular schools in the Morpeth Partnership, where the number of school places is in excess of the current local population. The significant level of house building planned for Morpeth town over the coming period begins to impact on surplus places in schools is expected to result in fewer places being available for children outside of the Morpeth Partnership and Ashington schools will retain more of their catchment children. However, in the meanwhile it is difficult for some schools to manage staffing plans and class organisation effectively and therefore it

is proposed that consultation on the reduction of PANs in schools most impacted by drift should be undertaken as part of the annual consultation on admissions arrangements, subject to approvals.

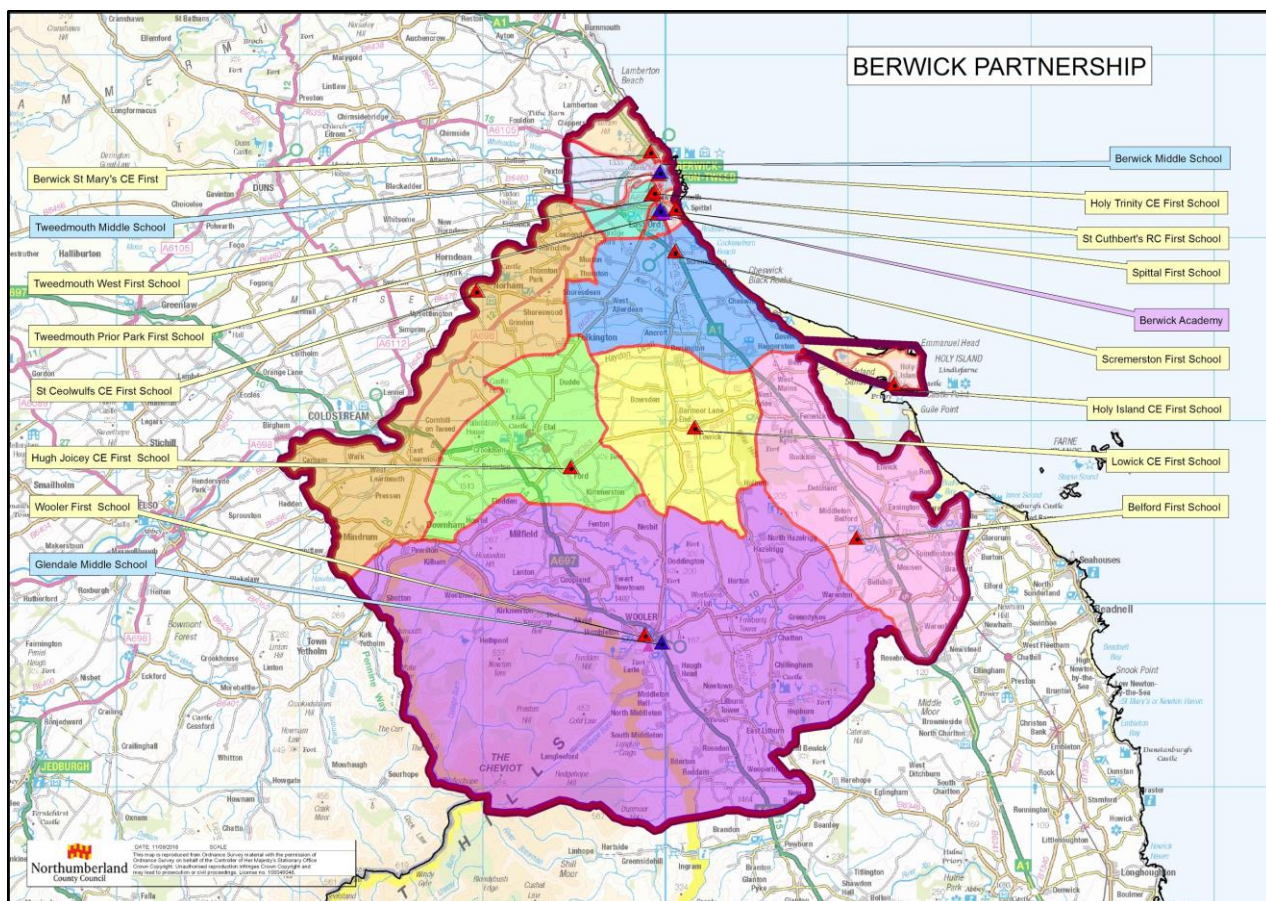
Ashington Academy is beginning to attract more catchment pupils and given the larger cohorts of pupils living in the catchment who will be entering secondary phase in the near future, this is a potential concern with regard to the number of places the academy is offering at entry, which is now below its actual capacity of 210.

Overall, the number of surplus places in Ashington Partnership match the County figure of 17%.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	238	250	250	275	283	268	261	176	207	180	177	148	53	29	2795
2022	247	240	251	248	278	279	275	208	174	193	178	172	42	44	2828
2023	258	249	241	250	251	274	286	219	205	164	192	173	48	35	2845
2024	233	259	248	237	250	246	278	226	214	190	160	184	48	40	2813
2025	212	234	257	243	237	244	249	219	220	197	185	153	51	40	2741
2026	238	213	233	253	243	231	247	196	214	203	193	177	42	42	2728
2027	235	237	210	227	251	236	233	194	190	196	197	183	49	35	2674
2028	233	234	234	204	225	243	237	181	187	173	190	186	52	41	2622
2029	229	232	233	230	205	220	247	186	177	173	170	182	53	43	2579
PAN TOTALS	288	318	308	308	308	308	308	180	210	210	210	210	150	150	3466

Key: PAN - Planned Admission Number

7.3 Berwick Partnership



The Berwick Partnership is almost wholly organised within the 3-tier system with one exception and is formed from the following schools:

- Berwick St Mary's CE First
- Tweedmouth West First
- Tweedmouth Prior Park First
- Holy Trinity CE First
- St Cuthbert's RCVA First
- Scremerston First
- Spittal First
- Norham St Ceolwulf's CE First
- Hugh Joicey CE First
- Wooler First
- Lowick CE First
- Holy Island CE First
- Belford Primary
- Tweedmouth Middle School
- Berwick Middle School
- Glendale Middle School
- Berwick Academy

Birth data for the partnership indicates a continuing if slow fall in pupil numbers for the foreseeable future. There is almost no inward flow of pupils into Berwick, with only just over 1% coming into the partnership; these pupils come mostly from out of county.

First schools are generally popular with pupils within their own catchment, but as the schools do not benefit from inward flows of pupils, levels of surplus places in this phase are high at 27%. However, significant numbers of pupils in the partnership leave the middle schools in the partnership to join schools in neighbouring partnerships to the south of the catchment and to join the Eyemouth High School in Scotland, which has recently had a new building. Consequently, there are 32% surplus places in the middle schools.

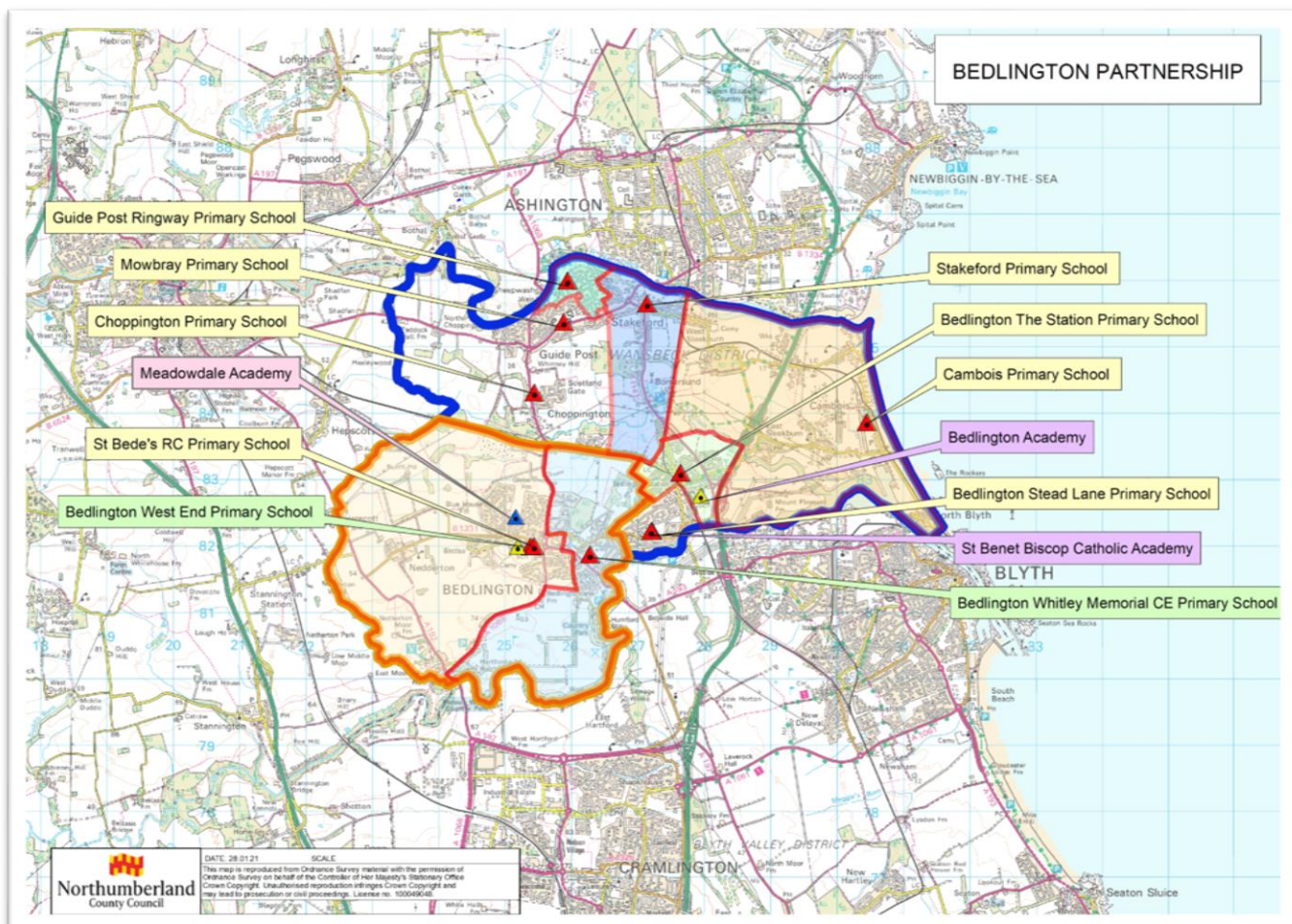
Berwick Academy continues to try to recover from the Requires Improvement as judged by Ofsted in January 2016, although the number on roll has risen the previous version of this document. The independent school Longridge Towers is also located in the Berwick greater catchment and the Council has historically arranged for children resident on Holy Island to be educated there from middle school age, which means they do not go on to join Berwick Academy in Year 9. Unfortunately, Berwick Academy currently has 45% surplus places, the highest level in the County, while the partnership as a whole has 34% surplus places. This is reflected in the pupil forecast below.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	208	177	188	218	238	227	217	173	181	146	126	121	65	41	2326
2022	187	213	178	188	218	232	226	192	162	150	145	122	51	52	2318
2023	168	193	214	179	189	214	232	201	180	136	150	141	51	41	2290
2024	169	173	192	213	178	184	212	205	187	149	134	144	57	40	2236
2025	164	173	170	188	209	171	180	185	188	152	145	126	58	46	2155
2026	178	167	169	165	183	199	166	155	168	152	146	135	51	46	2081
2027	171	180	164	164	161	175	194	143	141	136	146	137	56	41	2008
2028	168	172	177	160	161	155	171	169	131	114	131	138	58	45	1950
2029	168	170	171	175	158	156	152	150	155	107	112	125	58	46	1902
PAN TOTALS	293	293	293	293	293	279	301	301	301	225	225	225	150	150	3622

Key: PAN - Planned Admission Number

The Council has identified funding within the medium term capital plan to address the need for a new buildings in Berwick Partnership and as part of its due diligence to ensure that public funding is spent effectively on a sustainable school system in Berwick, it is envisaged that approval for consultation on education in the partnership will be sought prior to the commitment of such funding to specific building projects.

7.4 Bedlington Partnership



Bedlington Partnership became wholly primary/secondary in September 2020, after having a mixed economy of provision for several years. The schools are as follows:

- Bedlington West End Primary
- Whitley Memorial CE Primary
- St Bede's Catholic Primary
- Mowbray Primary
- Guidepost Ringway Primary
- Stakeford Primary
- Choppington Primary
- Bedlington Stead Lane Primary
- Bedlington Station Primary
- Cambois Primary
- Meadowdale Academy (primary)
- Bedlington Academy
- St Benet Biscop Catholic Academy

Bedlington West End and Whitley Memorial CE reorganised from first schools to primary schools in September 2020, while Meadowdale Academy reorganised from a middle to a primary at the same time. St Bede's Catholic Primary became part of the Bishop Bewick Catholic Education Trust in December 2020.

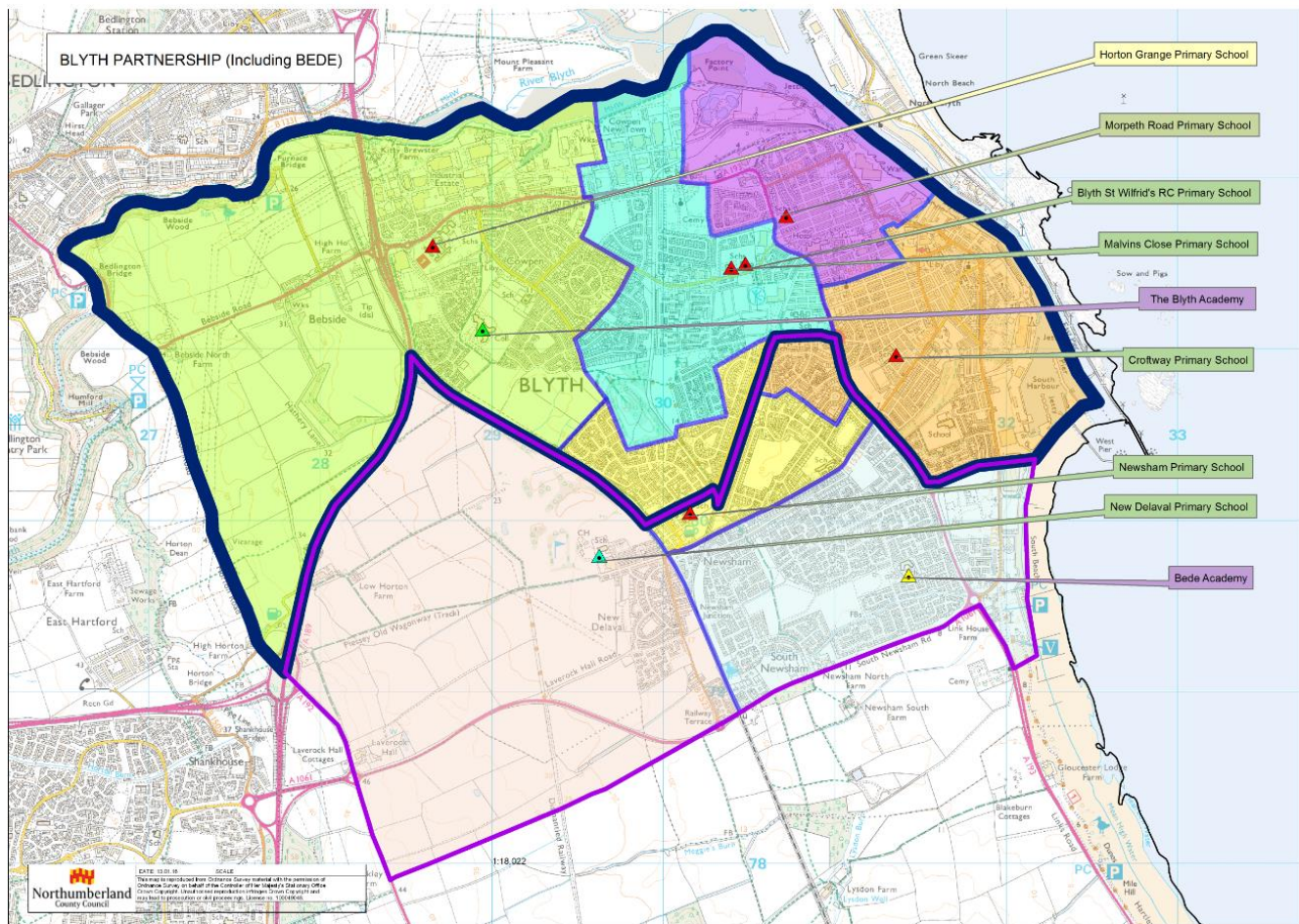
As a result of the reorganisation, additional places were needed in the secondary phase in Bedlington from Year 7. The Bishop Bewick Catholic Education Trust agreed to the expansion of places in Years 7, 8 and 9 at St Benet Biscop High School and six classrooms were constructed at the site during summer 2020 ready for the students' arrival in September, in spite of COVID 19 restrictions. St Benet Biscop Catholic Academy is the only RC 11-18 school in the county and just under half of its intake of pupils feed in from the RC primaries in the South East (and a small number from further afield), with the remainder of the pupils residing in the Bedlington area. Experience of other reorganisations in the county indicate that it will take 2 or 3 years for the new arrangements to become embedded in Bedlington.

The birth rate in Bedlington has been falling for a number of years and the current surplus places are predicted to increase. There is very little approved housing development in the town over the next five years therefore it is unlikely to reverse this trend, although there may be localised impact on some primary schools. As in all other cases, surplus places at the partnership level would not preclude requests for education infrastructure contributions from developers, should local impact on schools be identified.

Final Forecasts																NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS	
Actual Jan 2021	270	265	296	301	325	281	304	378	354	357	346	328	102	91	3998	
2022	260	271	267	298	306	327	280	381	383	358	345	334	106	86	4003	
2023	267	262	274	269	303	308	326	352	387	387	347	334	107	89	4013	
2024	242	269	263	275	273	304	307	407	355	390	374	334	106	90	3988	
2025	246	244	270	263	278	273	301	382	411	358	376	360	106	90	3957	
2026	257	248	245	270	266	278	271	376	386	414	345	362	115	89	3921	
2027	253	257	247	243	272	265	275	337	378	387	397	331	115	96	3853	
2028	252	253	257	245	245	270	261	341	338	379	371	381	106	97	3797	
2029	249	252	254	257	249	245	268	327	345	341	365	357	122	89	3720	
PAN TOTALS	300	300	467	467	467	353	353	458	458	458	360	360	360	360	5521	

Key: PAN - Planned Admission Number

7.5 Blyth Partnerships (including Bede)



Blyth has two partnerships, Blyth Partnership and Bede Partnership, which as two of the County's most urban partnerships covering the same town are more effectively considered together in relation to school place planning. Blyth was the second area to be reorganised in the primary/secondary structure in Northumberland since 2008. The town has the following schools:

- Horton Grange Primary
- Morpeth Road Primary Academy
- St Wilfrid's Catholic Primary Academy
- Malvin's Close Primary Academy
- Croftway Primary Academy
- Newsham Primary
- New Delaval Primary
- Bede Academy (all-through)
- The Blyth Academy

Two of the primary schools in Blyth feed to both Blyth Academy and Bede Academy (all-through). Of the nine schools and academies within the partnerships, six are academies with St Wilfrid's Catholic Primary became part of the Bishop Bewick Catholic Education Trust in December 2020.

Birth rates in general in Blyth have increased in recent years, but now appear to be steadying, although this masks some variation across individual catchment areas. Furthermore, house building programmes in the town have been increasing and their impact is beginning to be felt. As a result, capital projects were undertaken at Blyth Horton Grange Primary and New Delaval Primary to provide additional accommodation for growth in pupil numbers in those partnerships in current and future years. There is additional housebuilding in the Blyth and Bede Partnerships over the coming five years, but given the number of places now available in the partnership, it is envisaged that this will be sufficient to cater from demand from any additional pupils generated from new housing.

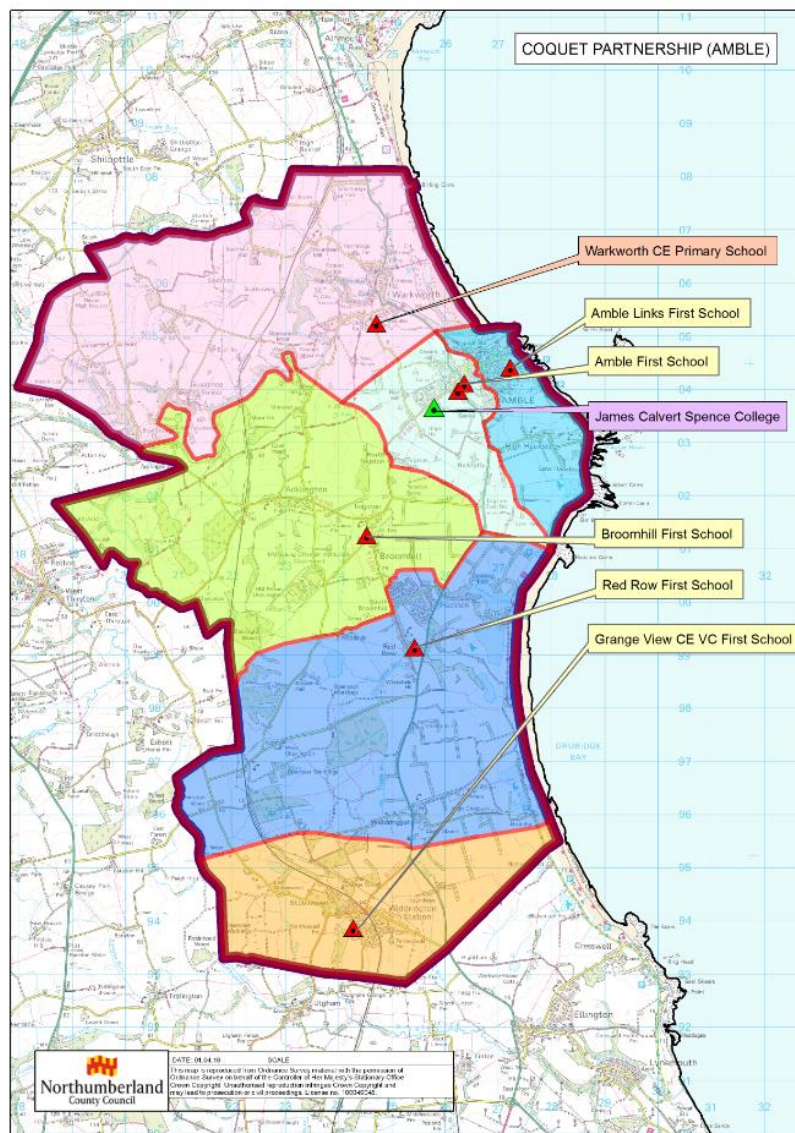
Overall, there now appear to be sufficient pupil places at primary level for local children with the majority of Blyth pupils staying in the town for their education. While there is some movement of pupils between catchment areas at primary phase in Blyth, there is a relatively low level of inward flow, with less than 1% coming into Blyth schools out of catchment at primary level and 5% coming into the secondary academies.

Based on January 2020 data, Blyth Academy attracts only 46% of students in its catchment area. Although not deemed necessary to accommodate local children in Blyth, Bede Academy increased its planned admission number into Year 7 from 105 to 134 (not including 90 pupils transferring from the primary element of the academy) from September 2019.

Given the retention of pupils at primary phase and at Bede Academy, the level of surplus places in Blyth is only slightly above the county average at 18%.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	418	447	422	438	458	434	408	369	400	347	352	333	102	70	4998
2022	438	423	447	426	439	455	430	363	373	392	346	352	106	89	5080
2023	463	443	424	451	428	437	451	384	367	366	391	346	111	92	5154
2024	414	468	440	423	449	421	429	398	383	357	361	386	108	97	5132
2025	394	417	463	438	419	440	412	377	397	371	351	356	121	94	5050
2026	425	397	412	461	434	411	431	362	376	384	364	345	111	105	5018
2027	423	425	391	409	455	424	401	377	359	362	376	358	109	97	4967
2028	421	424	420	388	405	446	415	352	376	347	355	369	113	94	4926
2029	414	422	421	420	386	398	438	365	352	365	342	351	118	99	4890
PAN TOTALS	510	510	465	465	465	465	465	464	464	345	345	345	300	275	5883

Key: PAN - Planned Admission Number



Like Berwick Partnership, the Coquet Partnership is almost wholly organised within the 3-tier system with one exception and is formed from the following schools:

- Amble Links First
- Amble First
- Broomhill First
- Red Row First
- Grange View CE First
- NCEA Warkworth CE Primary
- James Calvert Spence College (JCSC - age 9-18)

Birth data for Coquet Partnership is relatively steady, although this masks some variation in capacity at the individual school level, e.g at the first and primary phase, some schools are more popular and attract pupils from other catchments. Most pupils at first school phase attend school in the Coquet catchment, whereas only 66% of secondary age pupils attend James Calvert Spence College (JCSC), with other pupils attending neighbouring partnership schools, mainly The Duchess High School in Alnwick.

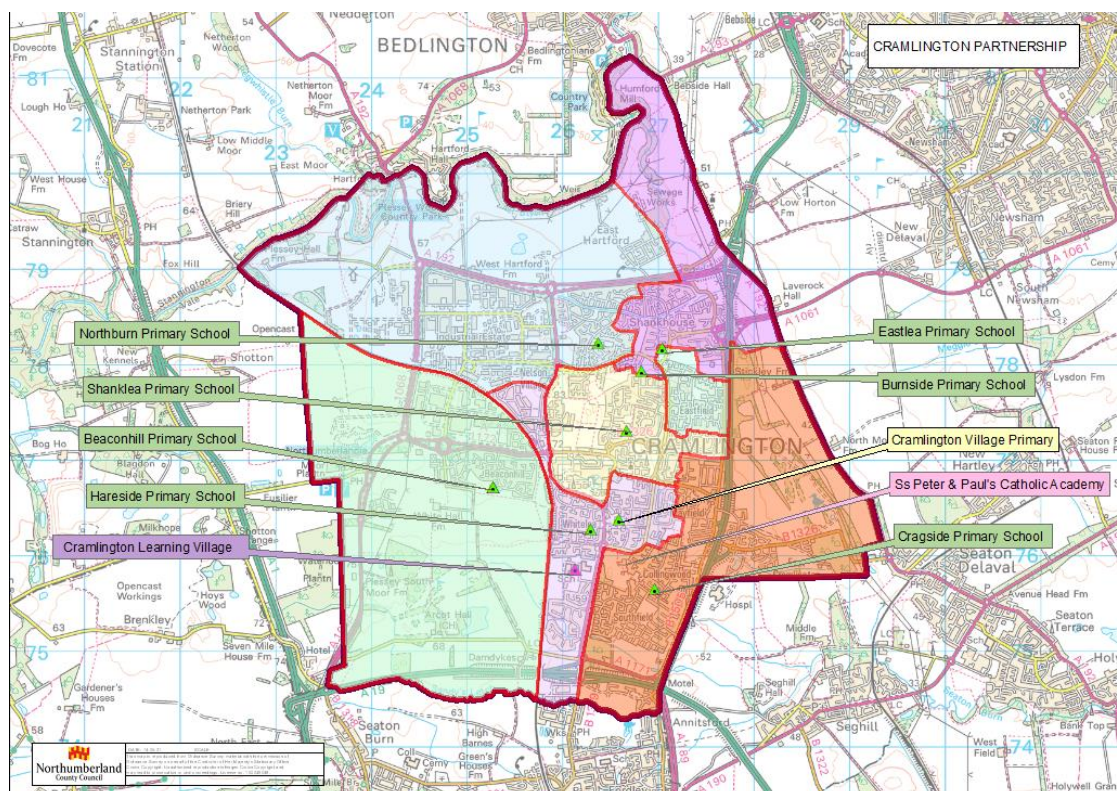
Funding has been allocated for investment in new buildings for James Calvert Spence in the Council's Medium Term Plan but this will be subject to Cabinet approval for plans to be brought forward.

There is also very little inward flow of pupils into the Coquet partnership, with only 2% of pupils at first school and secondary phase residing in other partnerships. There is some housebuilding planned within the partnership locally over this forecast period which will impact on a small number of schools, but due to parental preference there is sufficient capacity for pupils within their own catchment schools for the foreseeable future. As a result of relatively high surplus places at JCSC, overall surplus places in the partnership are at 26%.

Final Forecasts															
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR TOTALS
Actual Jan 2021	120	104	118	119	125	109	118	97	103	93	92	78	38	32	1346
2022	122	123	105	120	122	121	112	111	97	106	96	94	39	26	1395
2023	120	126	125	109	124	119	125	107	112	101	110	99	46	27	1450
2024	116	124	125	125	110	118	120	116	106	113	102	110	46	31	1463
2025	102	120	122	124	125	103	118	111	113	105	114	101	51	32	1442
2026	116	104	117	120	124	117	103	109	107	113	105	112	47	35	1429
2027	112	116	100	113	117	113	114	92	102	104	110	101	53	32	1378
2028	111	112	112	96	110	107	111	102	87	100	102	106	49	36	1341
2029	109	110	110	111	96	104	108	102	100	87	100	101	53	34	1326
PAN TOTALS	157	157	163	163	163	141	141	120	120	120	120	120	90	90	1865

Key: PAN - Planned Admission Number

7.7 Cramlington Partnership



Cramlington Partnership was the first in Northumberland to be reorganised to the primary/secondary system in 2007 and consists of the following schools;

- Northburn Primary
- Shanklea Primary
- Beaconhill Primary
- Hareside Primary
- Eastlea Primary
- Burnside Primary
- Cragside Primary
- St Peter and St Paul's RC Primary Academy
- Cramlington Village Primary
- Cramlington Learning Village (CLV - academy)

Most pupils living in Cramlington in the primary phase attend one of the town's schools, but there is much cross-over between partnerships. 10% of pupils on roll at the schools reside in neighbouring partnerships or out of county.

Cramlington Learning Village (CLV) is the feeder secondary academy and is a popular choice both within its own greater catchment with around 88% of catchment pupils attending, while around 12% of pupils on roll attend from neighbouring partnerships and from out of county.

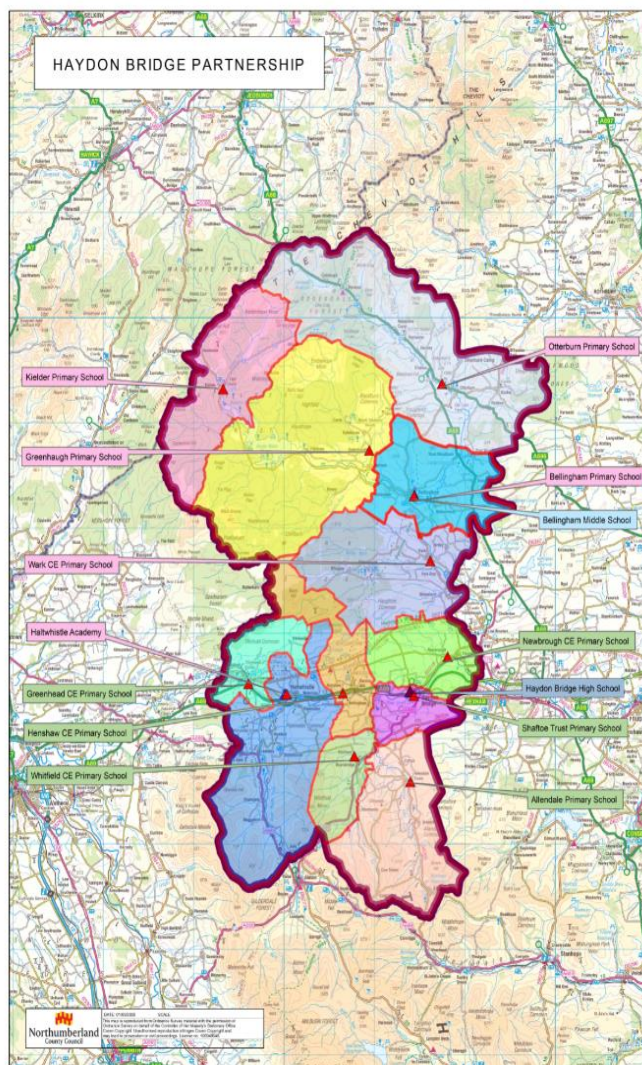
CLV currently has a PAN of 350, the largest in the county, and is predicted to be oversubscribed in Years 7 and 8 in future years by up to 11 places. However, this will be monitored as it is likely that these additional pupils would be able to be accommodated over the year groups or it is likely that these will be out of catchment pupils who can be accommodated within their own catchments.

As a result of considerable house building in the partnership, there are a number of Section 106 agreements in place to provide additional places. However, many of the estates in the town are maturing and birth rate has been decreasing in recent years, therefore pupil yield from new housing is not having any impact on the availability of pupil places. There is considerable scope for families living in Cramlington to have their first choice of primary school as a number of schools currently have much higher PAN than is required for the number of children living in their catchment. While it is envisaged that an additional form of entry will be required at Beaconhill Primary at some point, and there may be a need for a new school to serve the Arcot development site, there are still far more places in the primary schools than are required by the local community. Therefore, in order to balance the number of places available in schools to the needs of their communities, it is proposed that consultation on the reduction of PANs in some schools in Cramlington should be undertaken as part of the annual consultation on admissions arrangements, subject to approvals.

As a result of the popularity of schools in Cramlington with parents living in neighbouring partnerships and in North Tyneside, surplus places are one of the lowest levels in the county at 12% overall.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	364	322	339	304	394	357	354	346	354	332	346	352	180	148	4492
2022	313	372	330	349	311	402	363	356	351	352	337	350	174	158	4518
2023	335	320	380	340	356	318	408	365	361	350	357	341	171	153	4554
2024	319	340	320	382	338	355	316	401	362	351	347	353	164	150	4498
2025	280	324	340	321	381	337	352	310	398	352	348	343	171	144	4399
2026	321	284	326	343	322	382	337	348	309	389	351	346	167	150	4375
2027	310	323	284	327	342	321	380	331	345	300	386	347	169	147	4310
2028	310	311	323	284	326	341	318	373	328	336	297	382	171	148	4250
2029	307	312	314	327	286	327	341	315	373	322	335	296	189	150	4194
PAN TOTALS	390	390	390	390	390	390	390	390	390	390	390	390	390	390	5460

Key: PAN - Planned Admission Number



With the exception of Bellingham Middle School, Haydon Bridge Partnership is now organised as primary/secondary provision effective from September 2019. The partnership consists of the following schools and academies:

- Allendale Primary
- Whitfield CE Primary Academy
- Henshaw CE Primary
- Greenhead CE Primary
- Shaftoe Trust Primary
- Newbrough CE Primary
- Kielder Primary
- Wark CE Primary
- Greenhaugh Primary
- Otterburn Primary
- Bellingham Primary
- Haltwhistle Academy
- Bellingham Middle School and Sports College
- Haydon Bridge High School

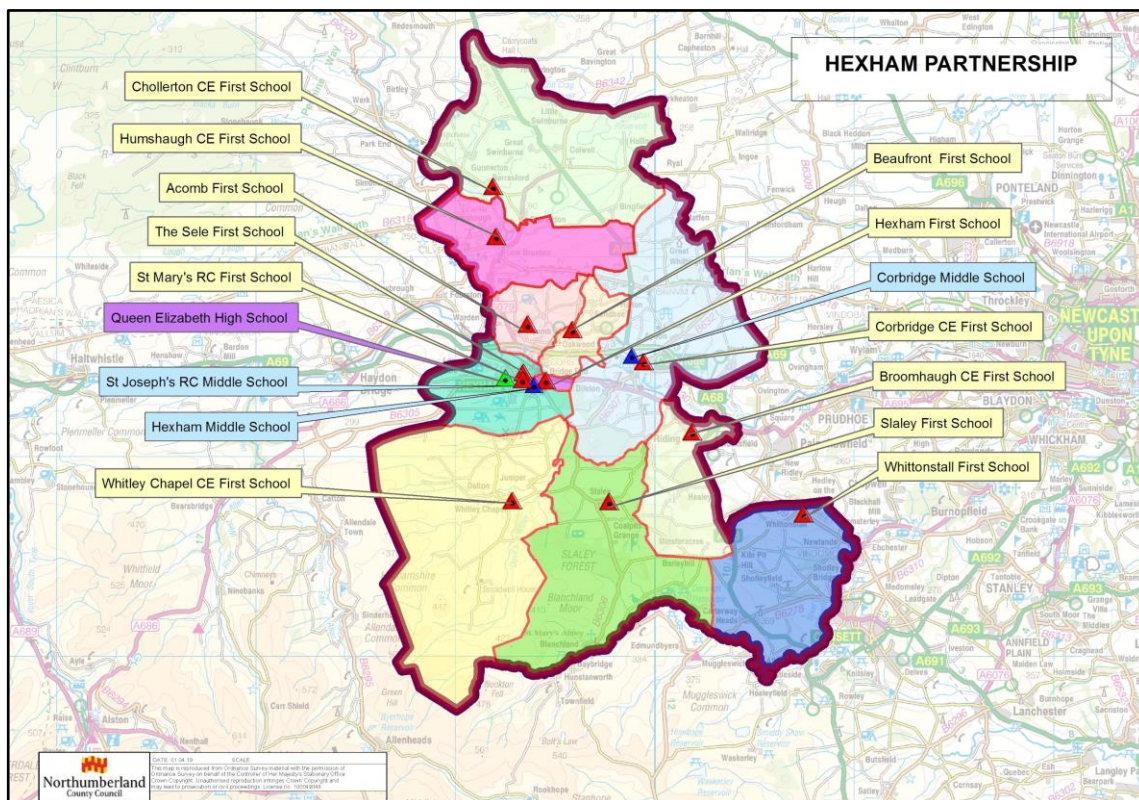
Significant capital investment in the school buildings estate was approved to support the move to full primary/secondary organisation, including at HBHS and Haltwhistle Academy (primary) which relocate to the former middle school site in the village. The Council had approved the closure of Bellingham Middle School as part of the overall changes in the partnership, but following an appeal by the school's Governing Body (as a Foundation school), the School's Adjudicator overturned the decision. West Woodburn First School was not approved to become a primary school with other first schools there were issues concerning the financial and educational stability of the school. As a result of all children leaving the school by Christmas 2019, a decision was made by Cabinet to consult on the closure of the school and this was approved in May 2020, with the school closing officially in August 2020.

There is very little inward flow into Haydon Bridge Partnership, with only 3% of pupils living in other partnership or out of county. Like other schools, local parents lost confidence in HBHS following 'Inadequate' Ofsted reports in 2014 and 2018. However, since the reorganisation of the remainder of the partnership in 2019 and the capital investment in the school, pupil numbers are beginning to recover, it is also expected that following the Ofsted inspection in July 2021 where the school moved to requires improvement, that the popularity of the school will continue to grow. However, surplus places in the partnership as a whole remain high at 41% and with very little housebuilding it is not expected that this figure will change much over the forecast period, although birth data remains steady.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	135	108	121	143	141	122	109	91	87	66	71	76	51	0	1321
2022	142	135	108	122	142	121	117	88	89	74	66	69	41	24	1338
2023	129	142	135	109	121	122	116	94	85	76	74	64	37	19	1325
2024	129	129	141	135	107	103	116	93	91	72	75	72	34	18	1315
2025	110	128	128	141	133	92	98	93	90	77	71	72	38	16	1288
2026	129	110	128	128	139	113	87	78	89	76	76	69	39	18	1278
2027	127	128	109	127	126	118	108	69	75	75	74	73	37	18	1266
2028	124	126	127	109	125	107	112	86	67	64	74	72	40	17	1252
2029	124	124	126	128	108	107	102	90	83	57	63	72	39	19	1240
PAN TOTALS	191	191	201	201	201	261	261	180	180	125	120	120	150	100	2482

Key: PAN - Planned Admission Number

7.9 Hexham Partnership



Hexham Partnership is organised within the 3-tier system and consists of the following schools and academies:

- Chollerton CE First
- Humshaugh CE First
- Acomb First
- The Sele First
- St Mary's Catholic First
- Whitley Chapel CE First
- Beaufront First
- Hexham First
- Corbridge CE First
- Broomhaugh CE First
- Slaley First
- Whittington First
- St Joseph's Catholic Middle
- Hexham Middle Academy
- Corbridge Middle
- Queen Elizabeth High Academy

St Mary's Catholic First and St Joseph's Catholic Middle became part of the Bishop Wilkinson Catholic Education Trust in December 2020.

With the exception of 2 or 3 blip years, over the past 15 years or so the birth rate in the Hexham Partnership has been in steady decline. However, due to the popularity of some schools and the ability to feed into popular middle and high school, significant numbers of pupils from outside of the catchment area take up places in particular schools which supports their viability. 5% of pupils on roll at first schools in the partnership reside out of county, while 10% reside in other Northumberland partnerships. At the middle school phase, 9% of pupils on roll live out of county, while 22% live in other Northumberland Partnerships. At high school level, while again 9% of pupils live out of county, 25% of pupils on roll live in other Northumberland partnerships.

As a result of the popularity of the schools, there are only 12% surplus places overall, although this masks considerable variation between individual schools. Therefore, while there are sufficient places at the partnership level, there are a small number of schools that may be impacted by the planned additional housing development over the forecast period and therefore could be identified to require infrastructure contribution where appropriate.

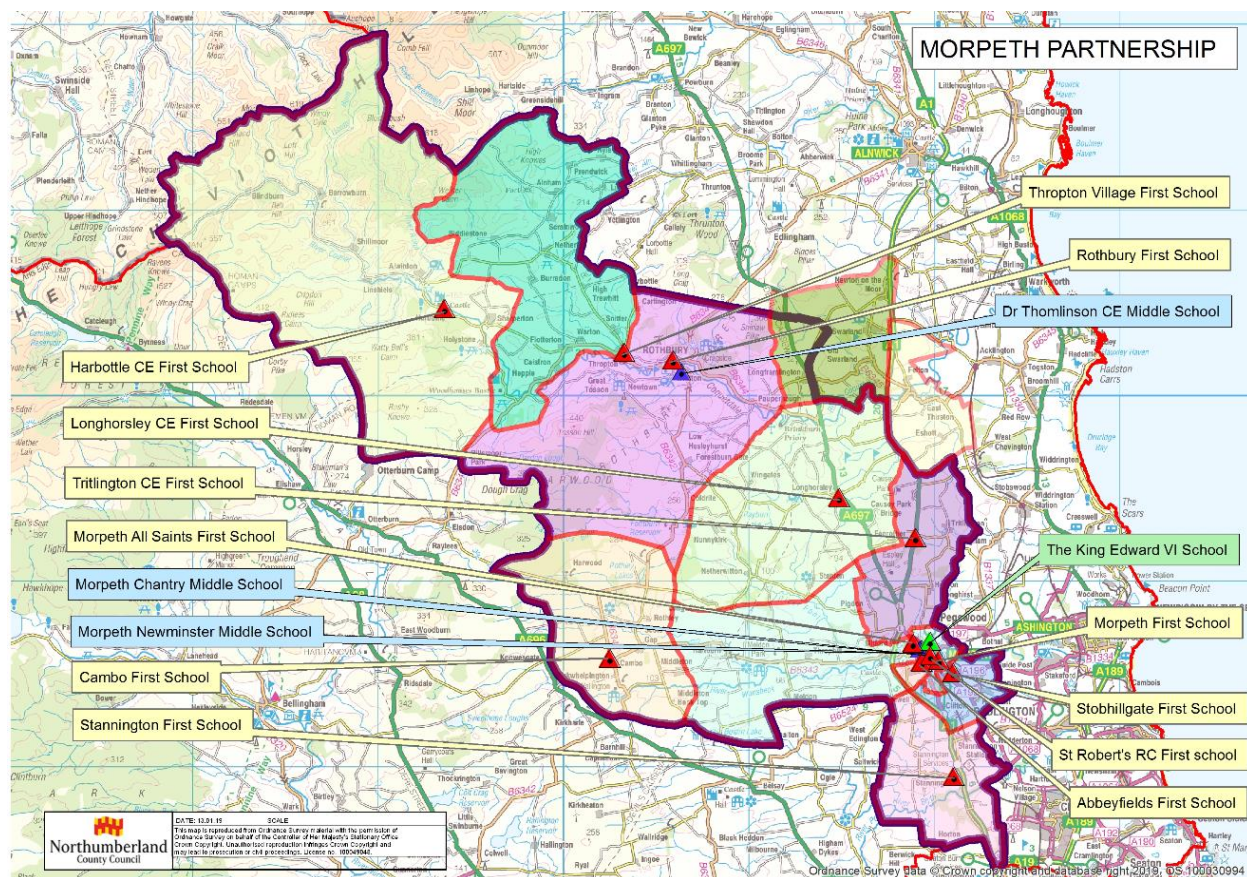
On the other hand, some schools in the partnership have very few children being born in their catchment areas which has led to high levels of parental choice at first school level. While parental choice is not in itself an issue, where this leads to large numbers of children being transported by car significant distances past catchment and other schools, this impacts on both the sustainability of more local schools to a child's residence and has a negative impact on the environment through unnecessary and long car journeys across the partnership. In the light of the sustainability of local schools and in support of the Council's Climate Change Action Plan to reduce car journeys and increase walking, cycling and the use of public transport, it is proposed that subject to approvals, consultation on the reduction of PANs in some schools in the Hexham partnership should be undertaken as part of the annual consultation on admissions arrangements, with a view to balancing the needs of schools' communities with their wider impact on each other and the environment.

Following consultation in 2018, the Council approved significant capital investment for the replacement of the Hadrian Learning Trust academy buildings (QE High School and Hexham Middle School). However, Cabinet noted the dire need for replacement buildings at QE High Academy (which together with Hexham Middle forms the Hadrian Learning Trust) and approval was given to develop a cost analysis for the re-provision and refurbishment of buildings for the two academies at the QE site; this work has now been completed and work is now underway to identify a preferred bidder for the scheme, with the buildings planned to be completed in 2021. Whittonstall First School is federated with Broomley First School in the Prudhoe Partnership and has become part of the Tynedale Community Learning Academy Trust, which was formed in September 2019.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	228	213	231	228	237	260	273	275	309	308	305	311	210	182	3570
2022	182	234	222	233	231	276	274	282	279	329	311	304	203	211	3570
2023	207	189	244	224	236	269	291	284	287	298	333	311	196	203	3573
2024	176	213	194	243	225	272	281	298	285	303	298	329	198	197	3514
2025	156	179	217	190	241	255	281	285	297	299	300	292	210	199	3401
2026	188	158	181	212	187	274	263	284	283	310	296	294	188	211	3330
2027	180	191	162	179	212	215	285	269	285	298	310	292	191	188	3256
2028	180	182	196	161	179	244	225	292	270	301	298	306	190	191	3216
2029	175	183	188	195	162	207	255	230	293	285	301	295	199	191	3157
PAN TOTALS	274	274	274	274	274	330	330	330	324	306	306	306	250	250	4102

Key: PAN - Planned Admission Number

7.10 Morpeth Partnership



Morpeth Partnership is organised within the 3-tier system and consists of the following schools and academies:

- Harbottle CE First
- Thropton Village First
- Tritlington CE First
- Morpeth All Saints First
- Cambo First
- Stannington First
- Rothbury First
- Morpeth First
- Stobhillgate First
- St Robert's RC First
- Abbeyfields School (first)
- Longhorsley St Helen's CE First
- Dr Thomlinson's CE Middle Academy
- Newminster Middle Academy
- Chantry Middle Academy
- King Edward VI High Academy (KEVI)

All of the academies listed above form part of the 3 Rivers Trust. Morpeth Partnership schools, particularly those located in and around Morpeth Town, are some of the most popular in the county. While the schools retain the majority of pupils in the greater catchment, there have been significant surplus places for a number of years and therefore this has allowed parents in Morpeth to have a greater choice of local school, as well as

surplus places being readily taken up by pupils from neighbouring catchment areas. At first and middle phases, 20% of the pupils on roll live in neighbouring partnerships, while at high school this rises to 26%. As a result, there are only 7% surplus places overall in the partnership.

While birth rates have been lower than the capacity of the schools, the influx of children from out of catchment into Morpeth town until more recently has not been problematic. However, in recent years there has been a surge in house building activity in Morpeth town and the surrounding locality which is scheduled to continue for at least the period of this forecast. Over time, it is expected that the pupils yielded from these new houses will take up a significant level of the surplus places and that in terms of population, theoretically there are enough school places in Morpeth schools for children and young people residing in the Morpeth Partnership.

As explained, surplus places in Morpeth town schools in particular are taken up by children and young people from outside of the catchment area and this is expected to continue for the foreseeable future. Therefore, children and young people moving into the new houses in Morpeth Town have difficulty in securing a place at a local school, particularly in the middle school phase, where this occurs outside of the normal admissions round. Compounding this situation, is the impact of the 3 Rivers Academy Trust Admissions Policy which gives priority to children who have been in a first school feeder school for at least 2 years for places in the middle schools and priority to children who have been in the middle schools for at least 2 years for places at KEVI in order to preserve educational continuity.

The impact of the change in admission arrangements has seen parents residing outside of the Morpeth catchment area applying for places in the Morpeth first schools, rather than waiting until the middle school phase, in order to ensure their children meet the 2 year criterion stipulated within the 3 Rivers Admissions Policy. This has led to fewer places being available for in-catchment children as they move into the partnership area. A reduction in the PANS of some first schools in the partnership where the PAN is considerably larger than is needed to serve the needs of its community would assist in reducing the pressure on places at the town's middle schools further down the educational pathway. However, as the Council is not the admissions authority for all schools in the partnership, an agreement would be needed with the relevant admissions authorities to undertake consultation on this proposal.

The Council carried out works to provide additional accommodation for an additional 30 places in Year 5 at Chantry Middle Academy for September 2018 to accommodate in-catchment children moving into the new housing in Morpeth Town. In September 2021, additional places have been provide at Newminster Middle School while Chantry Middle School has increased its PAN as a result of a large cohort of pupils currently in Year 4 in feeder schools. Funding from the Council was already in place for additional accommodation at Newminster following the previous need for expansion at Chantry, while the 3 Rivers Trust has project managed delivery of the additional accommodation. Pupil data indicates that further larger year groups coming into year 5 at the two middle schools are expected for another 2 years after 2021.

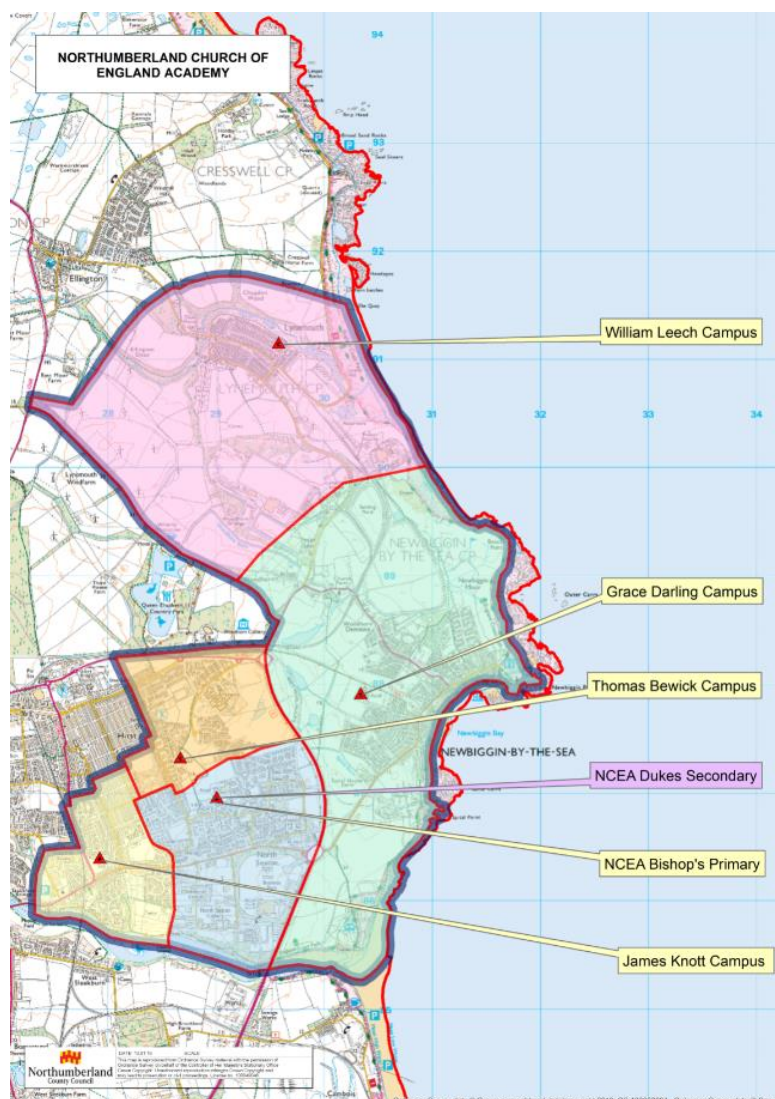
3 Rivers Academy Trust has stated that it does not wish to expand the PAN at KEVI in order to preserve the current educational experience for students. However, given the larger year groups expected in the town middle schools from 2021, the Trust has recognised that additional accommodation will need to be made at the KEVI site ahead of their arrival and this will be planned between the Council and the Trust ahead of their arrival at the academy.

Over time while it is expected that the number of children attending Morpeth town schools in particular from out of catchment will reduce significantly due to the take up of places by in-catchment children, there will be a bulge in numbers moving through the secondary phase for the foreseeable future, and in practice the PAN at KEVI will be capped at its current level of 320 places therefore reducing the number of out of catchment children. The reduction of places available in the Morpeth Partnership for out of catchment children over time will be beneficial to neighbouring partnerships, particularly in Ashington and Bedlington as they will be able to retain more local children in the schools in those partnerships.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	292	291	283	300	337	311	317	346	327	325	328	323	210	229	4219
2022	314	304	306	295	311	369	316	325	352	347	332	331	228	197	4326
2023	251	327	321	320	307	341	375	325	332	374	356	337	229	214	4410
2024	255	264	339	329	326	331	342	379	327	348	378	356	228	215	4417
2025	241	265	268	342	330	347	328	341	376	338	347	373	239	214	4348
2026	268	249	267	268	341	350	341	324	336	386	334	340	253	224	4281
2027	259	273	251	267	267	361	343	337	318	344	382	326	233	237	4198
2028	250	264	278	252	267	283	356	340	332	327	341	374	227	218	4109
2029	251	255	272	283	256	287	281	357	339	346	328	338	264	213	4071
PAN TOTALS	327	327	327	327	327	316	316	316	346	320	320	320	250	250	4389

Key: PAN - Planned Admission Number

7.11 Northumberland Church of England Academy Partnership



The Northumberland Church of England Academy was established as an all-through, 3-11 provision in 2009, including primary provision on sites in Hirst, Newbiggin-by-the-Sea and Lynemouth. NCEA's Josephine Butler Campus in Hurst included provision for secondary, primary and a specialist unit for SEND. The NCEA Trust has disaggregated its all-through provision into distinct phases of education as follows:

- NCEA Bishop's Primary
- NCEA Grace Darling Primary
- NCEA Thomas Bewick Primary
- NCEA William Leech Primary
- NCEA James Knott Primary
- NCEA Duke's Secondary School
- NCEA Castle School (special)

NCEA Warkworth CE Primary also forms part of the NCEA Trust, but for pupil place planning purposes the Council includes it within the Coquet (Amble) Partnership of schools.

Birth data indicates a steady number of children living in the NCEA Partnership area and this is above the actual capacity in schools. NCEA Bishop's Primary school only retains 63% of its catchment pupils, although this is somewhat ameliorated by the 11% of pupils who cross over to NCEA from neighbouring partnerships. Likewise, NCEA Duke's Secondary retains only 54% of catchment pupils, but again 15% of pupils on its roll live in other partnerships. The partnership has 19% surplus places overall, not much above the county average of 17%.

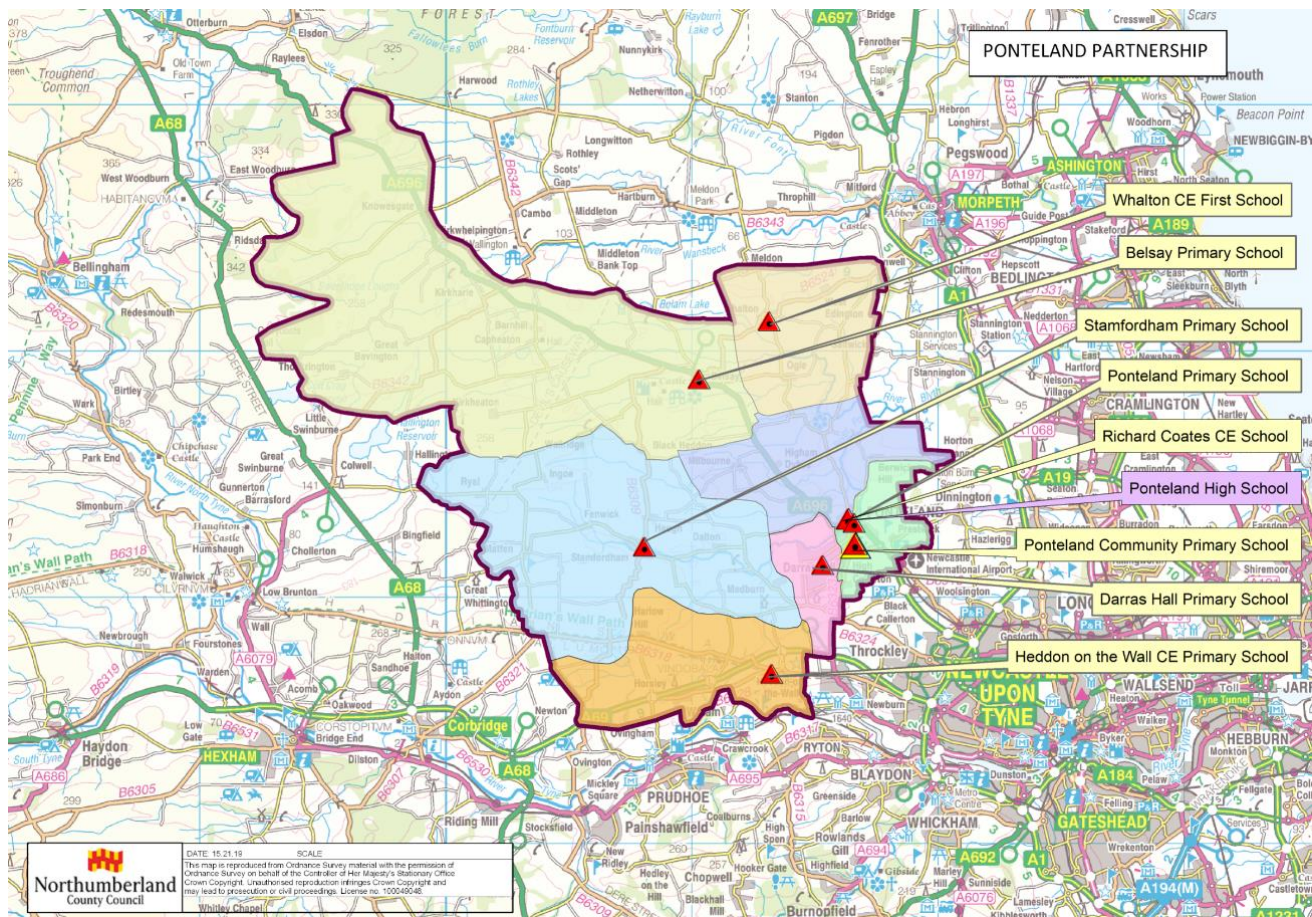
However, schools in NCEA suffer from a domino effect created in neighbouring partnerships with popular schools e.g. surplus places in Morpeth schools are filled by pupils living in Ashington, which then creates surplus places for pupils living in NCEA to take up. Therefore, over time it is expected that as children arising from new house building in Morpeth take up places that otherwise would have been taken up by Ashington pupils, the latter will then be retained in Ashington Schools and there will be fewer places available in that partnership to pupils living in the NCEA partnership. There is also some additional housebuilding planned to be constructed in the partnership over the next 5 years, which together with the envisaged push-back of pupils from other partnerships may require additional places to be created.

Therefore, bearing the above in mind, the impact of new proposed housing development in the NCEA partnership will be assessed at the local school level and where appropriate a contribution towards education infrastructure will be requested.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	173	183	185	194	178	184	188	186	193	174	153	161	38	48	2238
2022	182	175	176	186	197	175	185	198	185	195	173	149	65	23	2264
2023	187	185	170	179	190	194	177	196	198	189	196	170	59	39	2330
2024	158	190	178	171	182	187	195	186	195	201	188	190	67	36	2323
2025	152	161	182	178	172	177	186	204	184	196	198	182	74	40	2286
2026	171	155	153	181	178	167	175	193	200	184	193	190	71	45	2255
2027	168	170	144	149	178	169	162	179	187	198	178	182	75	42	2182
2028	168	168	141	141	147	170	166	167	174	186	192	169	73	45	2106
2029	167	168	160	141	142	143	169	173	164	175	183	185	68	44	2081
PAN TOTALS	210	210	210	210	210	210	210	190	190	210	210	210	210	210	2900

Key: PAN - Planned Admission Number

7.12 Ponteland Partnership



The reorganisation of Ponteland Partnership to the primary/secondary system was completed in September 2019 with Ponteland High School became an 11-18 secondary school. Ponteland Community Academy (formerly middle) also became a primary school in September 2020. The following schools and academies form the Ponteland Partnership:

- Whalton CE Primary
- Belsay Primary
- Stamfordham Primary
- Ponteland Primary
- Richard Coates CE Primary
- Darras Hall Primary
- Heddon-on-the-Wall St Andrew's CE Primary
- Ponteland Community Primary
- Ponteland High (secondary)

Ponteland High and Belsay, Ponteland, Richard Coates, Darras Hall and Heddon-on-the-Wall St Andrew's Primaries form the Pele Trust, while Ponteland Community Academy is a stand-alone multi-academy trust. Stamfordham and Whalton CE Primaries continue to be local authority maintained schools.

The Council has invested £57m in buildings, including schools and a new leisure centre, to support the reorganisation and to upgrade community facilities. This has included brand new accommodation for Ponteland High, Ponteland Primary and Ponteland Leisure on Callerton Lane into which they moved in October 2020.

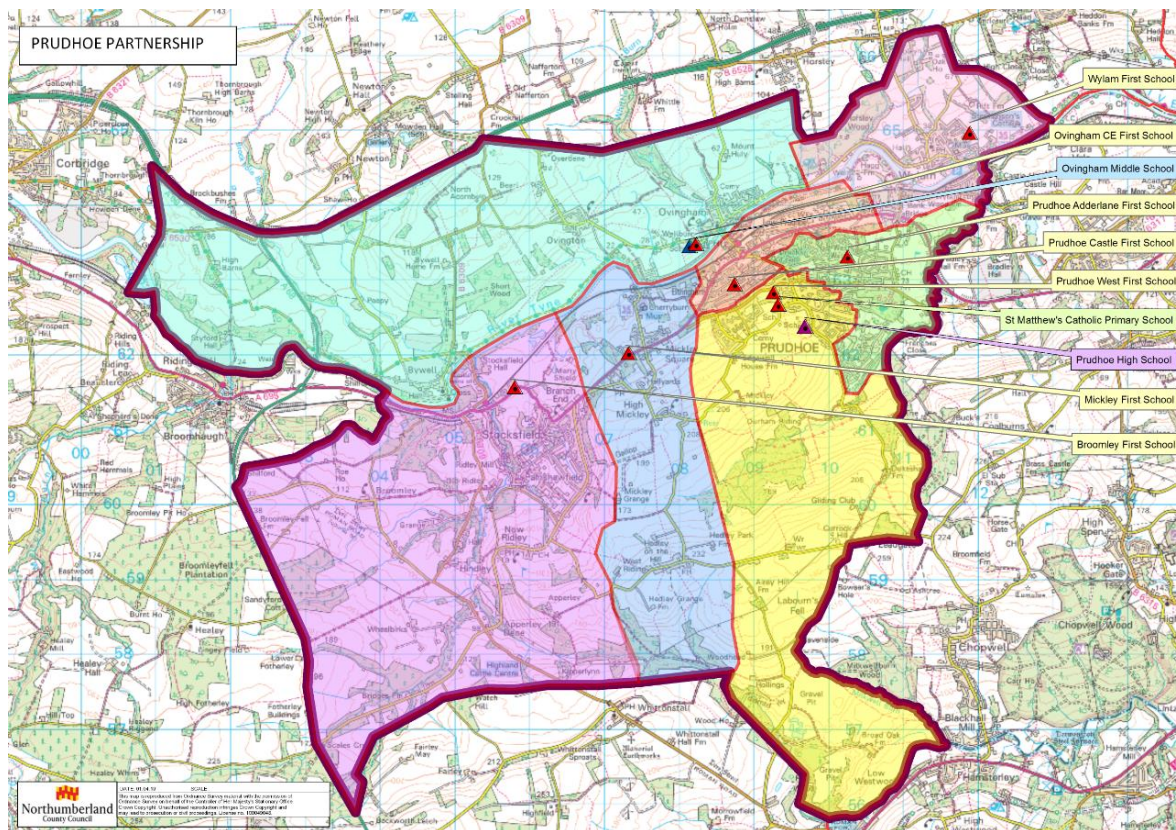
The birth rate in Ponteland Partnership has declined slowly for a number of years but there are now signs that it is plateauing. Schools therefore have considerable surplus places after their own catchment children have been allocated, and these are willingly taken up by pupils in neighbouring partnerships but mostly by pupils in neighbouring authorities. January 2020 data indicates that at the primary phase, 42% of pupils on roll in Ponteland Partnership schools reside out of county, while this rises to 48% in the secondary phase. However, as two primary schools that were former middle schools remain in their larger provision, there are still technically 18% surplus places in the partnership, although this will reduce when Richard Coates CE Primary moves into its new accommodation at the former Ponteland Primary School site in 2021.

The Council is aware of the impact on neighbouring authority schools of excessive numbers of their catchment children drifting into Ponteland schools and therefore there would be no plans to increase provision at maintained schools unless it was to satisfy demand for Northumberland Children. Therefore, while generally the surplus capacity indicates there are sufficient places across the partnership, some individual schools may be impacted by the planned housing development over the next five years, which although minimal could require additional places to meet local growth; in these cases it will be appropriate to request an education infrastructure contribution from the relevant developer.

Final Forecasts																NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS	
Actual Jan 2021	245	220	233	249	263	286	281	243	289	258	272	273	169	116	3397	
2022	225	254	232	245	269	283	283	243	240	275	261	272	154	150	3386	
2023	204	232	266	244	264	285	285	245	239	238	276	260	152	144	3334	
2024	211	210	240	276	259	283	283	243	238	234	237	273	144	142	3273	
2025	198	217	218	249	282	282	282	242	236	233	232	233	152	135	3190	
2026	215	203	224	225	264	280	280	240	235	231	231	229	131	142	3133	
2027	209	220	211	233	240	280	280	240	235	231	231	229	129	122	3091	
2028	207	214	230	220	249	280	280	240	235	231	231	229	129	121	3095	
2029	208	212	224	239	235	280	280	240	235	231	231	229	129	121	3092	
PAN TOTALS	280	280	280	280	310	310	310	240	240	272	272	272	200	150	3696	

Key: PAN - Planned Admission Number

7.13 Prudhoe Partnership



Prudhoe Partnership is organised in the 3-tier system, with one exception, and includes the following academies schools.

- Wylam First
- Ovingham CE First
- Prudhoe Adderlane First
- Prudhoe Castle First
- Prudhoe West First
- St Matthew's Catholic Primary
- Mickley First
- Broomley First
- Ovingham Middle
- Highfield Middle
- Prudhoe High School

Prudhoe Adderlane and Prudhoe West First Academies form part of the Wise Academies Trust (which also include schools in other partnerships in the county). Wylam, Ovingham CE, Prudhoe Castle, Mickley and Bromley Firsts, Ovingham and Highfield Middles and Prudhoe High School form the Tynedale Community Learning Trust, together with Whittington First School in the Hexham Partnership. St Matthew's Catholic Primary School now forms part of the Bishop Wilkinson Catholic Education Trust.

The birth rate in the Prudhoe Partnership has been declining steadily for a number of years. This has enabled a significant amount of inter-catchment movement of pupils, as parents

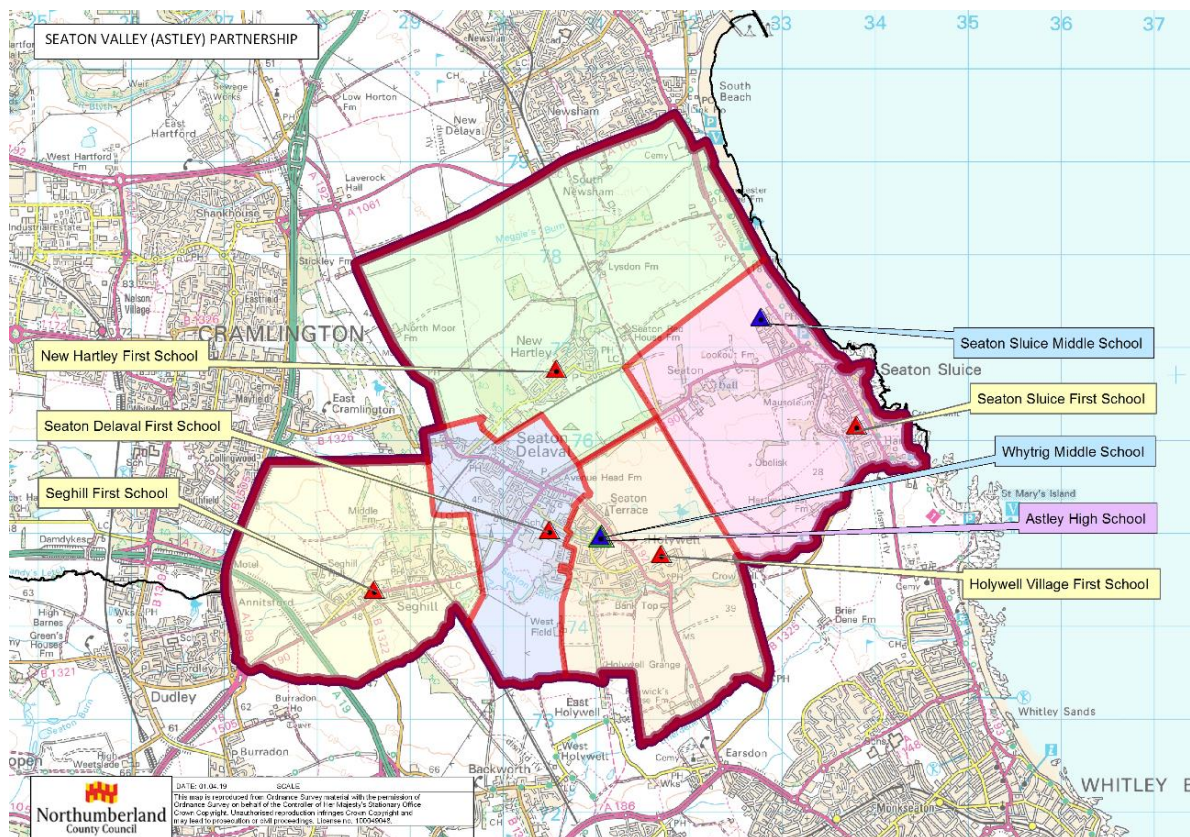
have been able to exercise their parental choice with ease due to the level of surplus places schools. There is very little inward movement from out of county pupils (unlike into some Hexham schools), with only 5% of pupils coming from other partnerships and out of county into the first school phase, 6% of pupils in the middle phase and 9% of pupils in the high school phase. While the overall level of surplus places is 12% in the partnership, there is considerable variation within individual schools, e.g. Prudhoe Castle First Academy has 58% surplus places, while Mickley First Academy has more pupils on roll than its recorded capacity.

As a result, while there appear to be sufficient places available in Prudhoe schools in general, the impact of planned housing development on individual schools will be assessed to ensure that contributions towards education infrastructure are requested when there is an identified need.

Final Forecasts Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	NOR TOTALS
Actual Jan 2021	196	176	195	196	191	212	189	165	198	193	181	196	106	96	2490
2022	157	204	176	196	194	192	216	175	167	189	197	182	116	99	2460
2023	156	163	203	176	194	195	196	200	177	160	193	198	106	108	2425
2024	168	162	160	201	172	192	196	179	199	167	160	191	114	99	2358
2025	133	174	159	158	196	171	193	179	178	188	168	159	111	107	2273
2026	162	138	172	158	155	195	172	177	179	169	190	167	93	104	2231
2027	154	167	136	169	154	153	196	157	176	169	169	188	97	86	2171
2028	154	158	164	134	165	152	154	179	156	166	169	167	110	91	2118
2029	153	158	156	162	131	164	154	141	179	148	167	168	99	103	2084
PAN TOTALS	251	251	251	251	251	242	242	216	216	220	220	220	150	150	3131

Key: PAN - Planned Admission Number

7.14 Seaton Valley Partnership



Seaton Valley Partnership is organised in the 3-tier system and includes the following schools:

- New Hartley First
- Seaton Delaval First
- Seghill First
- Seaton Sluice First
- Holywell Village First
- Seaton Sluice Middle
- Whytrig Middle
- Astley High

While pupil numbers overall in the Seaton Valley Partnership have remained more or less stable over a number of years, this masks a change in demographics in relation to individual schools, with the Seaton Delaval area experiencing a growth in the birth rate in recent years, and schools in the Seaton Sluice and Seghill area experiencing a fall in the birth rate. There are currently 9% surplus places across the partnership, and there is not a significant number of pupils attending these schools from out of catchment or out of county, except for Astley High where 26% of students (not sixth form) live outside of the partnership, including out of county (although the majority live in other Northumberland partnerships) and Seaton Sluice Middle where 25% of children live outside of the partnership. However, this masks variation at the school level.

Numbers of pupils being born in the Seaton Delaval First and Whytrig Middle School catchment have been increasing in recent years. In September 2017, the PAN of Seaton Delaval was increased from 30 to 45 in Reception to support the additional pupils being born in the catchment, while in September 2018 the PAN of Whytrig Middle was increased from 54 to 90 in Year 5. Additional capacity has been added to Whytrig Middle in a phased way to manage the increase in pupil numbers and further accommodation has been put in place over Summer 2021 ready for September.

However, due to surplus capacity in other first schools in the partnership, parental choice has meant that Seaton Delaval has not in fact consistently reached close to its PAN in every year group, perhaps because other schools are simply closer to the home address than the catchment school. This has led to difficulties for the school in staff planning and class organisation. Therefore, it is proposed that subject to approvals, consultation on the reduction of the school's PAN should be undertaken as part of the annual consultation on admissions arrangements in order to better reflect the flow of children across this small partnership.

It is not envisaged that any other schools in the partnership will need additional capacity at this stage. While there is minimal housebuilding planned over the next 5 years, the impact of any proposed housing development on an individual school will be assessed in line with the Council's Education Infrastructure Policy. As the year groups in Seaton Delaval First School are growing at the bottom end, the need to provide additional places at the school will be reviewed on an annual basis.

Final Forecasts															NOR
Year Group	R	1	2	3	4	5	6	7	8	9	10	11	12	13	TOTALS
Actual Jan 2021	126	150	134	140	156	129	133	156	148	133	138	141	80	71	1835
2022	127	125	148	135	139	157	132	144	156	145	135	135	86	70	1836
2023	132	127	125	150	135	141	162	144	145	153	149	133	82	75	1854
2024	136	131	125	125	149	136	144	175	143	141	155	144	80	72	1855
2025	111	136	129	125	124	149	138	155	174	140	143	151	88	70	1833
2026	127	111	135	131	125	125	154	151	155	171	143	140	92	76	1836
2027	126	126	108	135	129	125	127	165	149	151	172	138	85	80	1815
2028	126	125	123	108	132	128	127	137	163	145	153	167	84	74	1790
2029	125	125	123	124	107	133	131	137	136	160	147	148	102	73	1771
PAN TOTALS	165	165	165	161	161	175	175	175	139	150	150	150	100	70	2101

Key: PAN - Planned Admission Number

SURPLUS PLACES BY SCHOOL PARTNERSHIP

Alnwick Partnership (January 2021)

	Primary	Secondary
Surplus Places	614	156
% Surplus Places	31%	9%

Ashington Partnerships (inc NCEA Academy (January 2021)

	Primary	Secondary
Surplus Places	720	586
% Surplus Places	19%	23%

Bedlington Partnership (January 2021)

	Primary	Secondary
Surplus Places	590	2
% Surplus Places	26%	0%

Berwick Partnership (January 2021)

	First	Middle	Secondary
Surplus Places	385	374	417
% Surplus Places	27%	32%	46%

Blyth Partnership (inc Bede) (January 2021)

	Primary	Secondary
Surplus Places	545	560
% Surplus Places	15%	22%

Coquet Partnership (January 2021)

	Primary	First	Secondary
Surplus Places	10	138	332
% Surplus Places	7%	22%	31%

Cramlington Partnership (January 2021)

	Primary	Secondary
Surplus Places	417	180
% Surplus Places	15%	8%

Haydon Bridge Partnership (January 2021)

	Primary	Middle	Secondary
Surplus Places	329	157	478
% Surplus Places	28%	65%	53%

Hexham Partnership (January 2021)

	First	Middle	High
Surplus Places	216	200	91
% Surplus Places	16%	15%	6%

Morpeth Partnership (January 2021)

	First	Middle	High
Surplus Places	180	62	84
% Surplus Places	11%	5%	6%

Ponteland Partnership (January 2021)

	Primary	Secondary
Surplus Places	365	19
% Surplus Places	20%	1%

Prudhoe Partnership (January 2021)

	Primary	First	Middle	High
Surplus Places	-21	234	-39	138
% Surplus Places	-18%	21%	-6%	15%

Seaton Valley Partnership (January 2021)

	First	Middle	High
Surplus Places	99	-2	76
% Surplus Places	12%	0%	12%

Appendix 2 [Education Infrastructure Contribution Policy](#)



Agenda Item 8

Northumberland County Council

School Forum: 17 November 2021

SEND Update

1. Purpose of Briefing Note

2. Recommendations

To note the report and consider the contents of Section 5 in the light of the request to continue transfer of funds from the Dedicated Schools Grant into the High Needs Block for 22/23.

3. SEND Revisit

NCC and Northumberland CCG were given notification of a SEND revisit by Ofsted and CQC on 5th May 2021 the purpose of which was to identify whether the local area had made sufficient progress on the areas of improvement identified by the SEND inspection in October 2018.

The inspection was led by an Ofsted HMI Lead Inspector with an inspector from CQC and two shadow inspectors. The inspection commenced on 19th May with presentations from the Executive Director for Children's and Adult Services and leads for each areas of weakness. In addition, both inspectors met with the regional leads from NHSE and DfE who have monitored progress in Northumberland since the SEND inspection in October 2018.

Detailed position statements for the three areas of weakness were submitted alongside 94 pieces of evidence that detailed the actions taken, progress made and the impact on children and young people with SEND and their families.

Inspectors spoke with parents and carers of children and young people with special educational needs and/or disabilities (SEND) and met with local authority and National Health Service (NHS) officers. They spoke with frontline practitioners from education, health and care services in the area and reviewed a range of performance data and information, including the area's SEND strategy, self-evaluation, joint commissioning strategy and outcomes framework.

Inspectors reviewed a sample of education, health and care (EHC) plans, as well as education, health and care advice relating to these plans. Inspectors considered 558 responses to the online survey for parents and carers.

During the revisit inspectors commended professionals they met for their openness, honesty and their passion for the work being undertaken in improving support for children, young people with SEND and their families.

Outcome of revisit

The outcome of the SEND revisit was published on the 13th July 2021. Inspectors found that the area has made sufficient progress in addressing the three areas of significant weakness identified at the initial inspection. As such, it is no longer subject to the formal quarterly support

and challenge visits from the DfE and NHS England which will cease.

Inspectors found there has been significant improvement with a seismic change in leadership and culture since Northumberland was inspected in October 2018. The following strengths were highlighted:

- Collegiate approach to the delivery of SEND developments
- Revitalised strategy for children and young people with SEND
- Improved quality Of Education Health Care Plans
- Strong waiting times for children and young people to receive support for mental health
- Good understanding of the importance of early identification and the graduated approach from SENCos with needs being met more consistently across schools
- Strong Parent Carer Forum providing challenge to the SEND Partnership
- Academic outcomes are improving and exclusions for learners with SEND have reduced year on year for three years

While the outcome is positive, it is important to note the context. The revisit inspected whether the improvements the SEND Partnership committed to make detailed within the Written Statement of Action (WSOA) Plan were delivered and whether they are improving experiences of children and young people with SEND and their families. The SEND Partnership while wishing to demonstrate positive progress also acknowledged to the inspectors that there is more work to do, particularly in relation to Preparation for Adulthood and supporting inclusive educational practice in mainstream schools.

4. SEND Strategy

Following a period of consultation, Northumberland's SEND Strategy 2021 - 2024 was published in early June and can be accessed here [SEND-Strategy-2021-2024.pdf](https://www.northumberland.gov.uk/SEND-Strategy-2021-2024.pdf) ([northumberland.gov.uk](https://www.northumberland.gov.uk))

The strategy details four key priorities

1. Working together
2. Delivering the right support at the right time (including therapy services and support for those with sensory processing difficulties)
3. Inclusive education and success for all learners
4. Effectively prepare children and young people for adulthood

The workstreams that supported the written statement of action have now been aligned with the priorities to enable the effective delivery of the strategy. An action plan will be published in the Autumn Term 21 detailing what actions will be taken to address the four priorities that will enable improvement and development work within SEND to continue.

5. Update on Provision of High Incidence Needs Teams Free at the Point of Delivery 20/21

The first full year of operating a free on delivery service to schools was within the context of the COVID pandemic, and the year was disrupted by a national lockdown between January and March. However, the teams involved continued in their support to children, families and schools, working with a blended offer of in person and virtual support based on the need of each case referred.

There is comparative data available for the academic year 20/21 with the previous year, which demonstrates that despite the context described above, increased reach was achieved. Overall, the team attended to 36% more referrals during the course of the year, and worked into an increase of 19% more schools than in the previous year. This means that in 2020/21 the teams were involved in support across 92% of our schools as opposed to 78% of schools in the previous year.

The work of the teams includes:

- Support and advice for individual learners to inform the best ways of including all, and ensuring access to school life so that outcomes are improved
- Whole school training to develop whole school approaches to inclusion and SEND
- Supporting the implementation of graduated approaches in schools

Within the Education and Skills Priorities 2021/22 and SEND Strategy 2021-24, the drive is for learners in Northumberland to attend an inclusive school or setting as close to home as possible. The ongoing work of these teams, along with Low Incidence Needs Teams (Sensory Support, Portage) Educational Psychology accelerates progress towards achieving this aim.

TABLE 5.1 REFERRALS TO HINT SERVICES BY PARTNERSHIP

PARTNERSHIP	REFERRALS 2019-2020	REFERRALS 2020-2021	% CHANGE
ASHINGTON	49	108	120
BEDLINGTON	69	103	49
MORPETH	58	91	57
ALNWICK	100	113	13
BERWICK	118	135	14
COQUET	35	46	31
BLYTH	135	161	19
CRAMLINGTON	101	78	-23
SEATON DELAVAL	59	69	17
HAYDON BRIDGE	21	49	133
HEXHAM	35	73	109
PONTELAND	4	21	425
PRUDHOE	22	47	114
OTHER	2	4	100
TOTAL	808	1098	36%

TABLE 5.2 REFERRALS TO HINT SERVICES BY LOCALITY

PARTNERSHIP	ACCESS TO HINT SERVICES 2019-2020	ACCESS TO HINT SERVICES 2020-2021	% CHANGE
CENTRAL	176	302	72
NORTH	253	294	16
SOUTH EAST	295	308	4
WEST	82	190	132
TOTAL	806	1094	36

TABLE 5.3 NUMBER OF SCHOOLS ACCESSING HINT SERVICES

PARTNERSHIP	SCHOOLS /SETTINGS ACCESSING HINT SERVICES 2019-2020	SCHOOLS/SETTINGS ACCESSING HINT SERVICES 2020-2021	+ OR -
ASHINGTON	7	11	+4
BEDLINGTON	12	15	+3
MORPETH	15	17	+2
ALNWICK	12	13	+1
BERWICK	16	17	+1
COQUET	4	6	+2
BLYTH	9	10	+1
CRAMLINGTON	12	9	-3
SEATON	8	8	0
DELAVAL			
HAYDON	7	9	+2
BRIDGE			
HEXHAM	14	15	+1
PONTELAND	2	8	+6
PRUDHOE	9	11	+3
OTHER	1	3	+2
TOTAL	128	152	24

Ensuring the funding to support the model moving forward has additional benefits:

- a. Follow up work for individual learners is based on need rather than being influenced by financial factors. Referrals for children and young people can involve more than an additional assessment and can be determined by specialist staff in conjunction with the school
- b. Specialist staff and leaders can use resource and time flexibly, contributing to strategic work.
- c. Via participation in multi-agency groups eg Early Help Hubs, exclusion scrutiny group, Team Around the School pilot, under the current arrangements the teams can proactively offer support when there is a need, rather than relying on referrals from schools. This promotes the early intervention approach which underpins the vision for Northumberland Children's Services.
- d. Exclusions data over the past 4 years demonstrates the continued need for an NCC response to reduce exclusions for learners with EHCPs and on SEN Support. The work of Autism Support and Emotional Wellbeing Behaviour Support are key in this, working alongside Inclusion Support Workers in partnership with families and schools. This is crucial work in improving outcomes for children and young people who are already vulnerable.

TABLE 5.4 Exclusions Data for pupils with SEN

		2017/2018	2018/2019	2019/2020	2020/2021
Overall School Population		39827	40439	39766	39994
Permanent Exclusions	EHCP	6	4	0	0
	SEN Support	53	23	12	12
Fixed Term Exclusions	EHCP	291	180	112	158
	SEN Support	1347	769	391	592

6. Better Futures project

We are currently reviewing the Education Health and Care processes and pathways in Northumberland through the Better Futures project. The main aim of the project is to create a sustainable and forward-thinking EHC system which consistently delivers timely processes which are transparent, robust, and equitable. Underpinning the project is the understanding and communication of clear roles and responsibilities and it builds on the developments within SEN provision in Northumberland that have taken place over the past 4 years. The project is fully committed to genuine coproduction and holds firm the values of cost-effective delivery within anticipatory practice. Our aim is that Northumberland's EHC systems will be a beacon for outstanding practice which enables families, young people, and children to participate in making well informed decisions about best outcomes. It will ensure that long term, the local area can meet increasing demand in the best possible way. With 6-7% increases in requests for statutory assessment year on year, this is of great importance.

The project will look at the process and systems within EHC needs assessments and Annual Review pathways including decision making and commissioning.

The initial implementation of the project will be for 6 months, with further developments being strengthened and embedded into the future. Next steps are a series of stakeholder events including with schools, parents and carers and other partners.

Nicola Taylor and Sam Barron
Head of Inclusive Education and SEN Transformation, and Head of SEN Strategy and DCO
5 November 2021.

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Northumberland County Council

Agenda Item 9

**Schools Forum
17 November 2021**

Comparison of 2021/22 NE Schools block Funding Formula Values

1. Purpose of the Report

To provide information regarding the respective formula values used by the 12 NE local authorities and our neighbouring authority Cumbria in 2021/22. This is to provide additional insight and assurance in respect of the continuing implementation of the National Funding Formula (NFF) and potential implications for school funding in Northumberland for 2022/23 and beyond.

The report should be considered in conjunction with the NFF update and consultation and update elsewhere on the agenda, and the associated proposals for 2022/23.

2. Recommendations

Schools Forum is asked to consider the attached information to inform the consultation in relation to the setting of school funding formula values for Northumberland for 2022/23.

3. Background

Schools Forum received a report in July 2019 highlighting the progress made towards the implementation of the National Funding Formula (NFF). For Northumberland in 2019/20, of the 28 key formula factors highlighted, for Northumberland:

- 20 were in line with NFF values;
- 6 were higher than NFF figures including Primary and KS4 AWPU and certain deprivation indices; and
- 2 were lower than NFF values, including Primary Low Prior Attainment.

Due to disruptions by the covid pandemic, this report was not produced for 2020/21 but the values used by LAs for 2021/22 is now available at:

<https://www.gov.uk/government/publications/schools-block-funding-formulae-2021-to-2022>

This report and the accompanying presentation compare the 2021/22 funding values for the 12 North East LAs and Cumbria.

4. Basic per-pupil entitlement

This is a mandatory factor which every local authority must use in their 2021 to 2022 formula. Local authorities are permitted to choose different age-weighted pupil unit (AWPU) rates for primary pupils, for key stage 3 pupils and for key stage 4 pupils; but they must specify a primary AWPU of at least £2,000, and key stage 3 and key stage 4 AWPU values of at least £3,000.

6 of the 13 authorities have set their Primary AWPU value in line with the NFF figure of

£3,123. 1 authority has a figure that is less than the NFF value, while 6 including Northumberland have a higher figure. The range of figures varies from £3,113 to £3,168 per pupil, a spread of £55 (1.8%).

At KS3, 8 authorities, including Northumberland have set their figures in line with the NFF AWPU figure of £3,863, 1 is below and 5 are above. Figures range from £4,390 to £4,468, a spread of £78 (1.8%).

At KS4, 6 authorities have set their figures in line with the NFF AWPU figure of £4,963. 1 is below and 6 are above including Northumberland. Figures range from £4,947 to £5,064, a difference of £117 (2.3%).

5. Deprivation

This is another mandatory factor which every local authority must use in their formula. Local authorities can distribute their deprivation funding using any combination of the three indicators: children eligible for free school meals (FSM), children eligible for free school meals in any of the last 6 years (FSM6) or Income Deprivation Affecting Children Index (IDACI) data. IDACI is a measure of income deprivation and identifies the proportion of children in out-of-work households or on low incomes. Based on postcode properties are allocated to one of 7 bands, individual financial assessments are not carried out in respect of IDACI.

There is also some significant variation in the overall proportion of funding distributed by deprivation, even within the North East comparators. The average for the 13 authorities is 11.9% of total DSG is distributed via deprivation; however individual authority figures vary from 6.2% to 16.6%. Northumberland at 8.9% is below the average, and represents the second lowest figure.

Historically Northumberland used FSM and IDACI but introduced FMS6 into the formula in 2018/19 following initial NFF information.

Comparisons based on FSM and FSM6 are relatively straightforward, unlike IDACI where each LA can assign a different value to each of the different bands.

FSM and FSM6:

All 13 authorities use FSM in their formulas, 9 use the NFF value of £460 per child (at both primary and secondary), 2 LAs used a lower figure and 2 use a higher figure. Figures range from £320 to Northumberland's figure of £570, a difference of £250 (78%).

In relation to FSM6, all 13 authorities use this in their formula. 10, including Northumberland are in line with NFF, one authority is below and 2 are above. Figures range from £837 to £881, a difference of 5.2%.

IDACI:

Comparisons involving IDACI are more difficult due to the different levels of banding involved. Northumberland is in line with NFF values for all bands. This applies to 11 of the 13 authorities, with difference being generally relatively marginal.

6. Prior attainment

While use of this factor is optional, all 151 local authorities are using the indicator.

For primary pupils, the indicator is the number of children in years one to 6 assessed under the new early years foundation stage profile as not achieving a good level of development. For secondary pupils a new national curriculum and assessment was introduced in the 2015 to 2016 academic year. The proportion of pupils who fall in the low prior attainment bracket is higher than previous, so a national weighting has been applied to each of these years to prevent them overly influencing the funding levels.

At Primary the NFF value was £1,095 per qualifying pupil, values used ranged from £840 (Northumberland's figure) to £1,110, a difference of £270 (32%). 2 authorities were below NFF, 10 were in line, and 1 above.

At Secondary the NFF value was £1,660, values used ranged from £1,634 to £1,684. 1 authority was below NFF, 11 including Northumberland were in line, with one above.

7. Lump Sum

The NFF values have the same lump sum at primary and secondary, at £117,800. Northumberland had previously had higher differentiated values for Middle and High / Secondary schools. 11 authorities, including Northumberland, are in line with the NFF, with 1 above and 1 below but the differences are marginal in this area.

8. Mobility

The pupils eligible for funding through the NFF mobility factor are pupils whose school census record at their current school (or one of its predecessors) in the last three years indicates an entry date which is not "typical". In practice this means that the first schools census a pupil is recorded as attending a school is a January or May census, not an October one. Historically Northumberland has not included a mobility element with its funding formula, due to concerns in relation to the data and the fact that it does not reflect net patterns of pupil movement, simply pupils starting outside the traditional September date.

However, it is a feature within the NFF, even though it is responsible for the distribution of a relatively small amount of funding, the NFF values for 2021/22 are £900 (Primary) and £1,290 (Secondary). Using full NFF values, 2021/22 data for Northumberland suggests that this would be responsible for £56,063 of Northumberland Schools Block funding, and impact 21 schools. The largest single amount paid to an individual school is £6,390.

Given we have not previously used this factor, it is proposed that we adopt a similar approach as we adopted last year and move 50% towards the NFF Values, this allows us to introduce Mobility into Northumberland's formula in a phased manner and assess its impact.

9. Growth and Falling Rolls Fund

School Forum are aware that we have previously introduced a Growth Fund in Northumberland and used it where there is evidence for growing demand from within a school's catchment area for school places. This is a common approach across the group with 11 of the 13 Authorities having Growth Funds. Less prevalent is for LAs to have a Falling Rolls fund; only 2 of the 13 authorities did this in 2021/22. Guidance is provided in relation to both Growth and Falling Rolls funds by the ESFA which is available below:

<https://www.gov.uk/government/publications/pre-16-schools-funding-local-authority-guidance-for-2020-to-2021/growth-and-falling-rolls-guidance-2020-to-2021>

The key requirements are that support is available only to schools judged good or outstanding, and local planning data show the surplus places will be needed within the next three financial years.

10. Summary and Conclusions

An accompanying presentation provides a summary of the key formula values used by the 13 authorities for 2021/22. This information is provided for further context for discussions in relation to the setting of formula values for 2022/23.

B Parvin

Education and Skills Business Manager

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Northumberland County Council

Agenda Item 10

Schools Forum: 17 November 2021

National Funding Formula & Dedicated Schools Grant (DSG) & Consultation on 2022/23 Funding Values

1. Purpose of the Report

To provide further additional information in respect of the continuing implementation of the National Funding Formula, the Dedicated Schools Grant (DSG) and associated 2022/23 Schools Funding information. This includes formal consultation with Schools Forum in relation to funding values for 2022/3 and a transfer from the Schools Block, s has been undertaken in previous years.

2. Recommendations

Schools Forum is asked to:

- a. Agree the transfer of up to 0.5% of the final value of the Schools Block as an ongoing contribution to the costs of SEND Support Services, once the final DSG values are released in December.
- b. Agree that the funding values for 2022/23 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 Executive Director of Adult Social Care and Children's Services, once final funding becomes known in December 2021, in order to enable the required Cabinet report to be prepared and submitted to the 11 January 2022 meeting, and the submission of the necessary return to the ESFA by 21 January 2022.
- d. Receive a further report to the School Forum meeting on 19 January 2022 on the outcome of the consultation with schools and final funding values to be used for 2022/23.

3. Background

Schools Forum has previously received reports outlining developments in relation to the National Funding Formula (NFF). Information from the Department for Education (DfE) has confirmed their intention to move to a National Funding Formula (previously known as the "Hard" Formula though the ESFA are now using the term "Direct" Formula) but there is no definitive information as to when this will be implemented. Once the NFF hard formula is fully implemented, local authorities will have no discretion in the values of the individual factors used to distribute funding to schools, as is the case now, within the overall framework provided by the ESFA Revenue Funding Guide and the associated Authority Proforma Tool (APT) used to calculate individual school budget shares.

At the 18 November 2020 meeting, for 2021/22 Schools Forum agreed a two-step approach towards the adoption of National Funding Formula figures. This meant that

those values that were significantly over (Primary and KS4 Age Weighted Pupil Unit (AWPU)) or under (Primary Low Prior Attainment) National Funding Formula Values would have this gap closed in two equal steps. These were illustrated by the figures below, with the final 2022/23 NFF rates now added in Column (j):

Factor (a)	2020/ 21 NFF Values (b)	2020/21 NCC Values (c)	2021/22 NFF Values (d)	Difference between 20/21 NFF and NCC rates (e)	First Step to NFF in 21/22 (f)	Final 21/22 NCC Rate (g)	Second Step to NFF in 22/23 (h)	Projected 22/23 Rate (@21/22 rates) (i)	Final NFF (& *NCC Rate) for 2022/23 (j)
AWPU Primary	2,857	2,919	3,123	62	-31	3,154	-31	3,123	3,217
AWPU KS4	4,561	4,763	4,963	202	-101	5,064	-101	4,963	5,112
Low Prior Attainment Primary	1,065	555	1,095	-510	255	840	255	1,095	1,130

** subject to affordability and final settlement figures*

It was felt that this approach would provide a substantial increase to those schools in receipt of Primary Low Prior Attainment while offering a degree of protection to schools who currently benefit from receiving AWPU rates more than NFF figures. Importantly overall this was felt to be consistent with the established Schools Forum view of progressing towards NFF in a gradual and smooth transition.

4. Latest Information

The provisional 2022/23 allocations based on October 2020 data are shown in the table below:

DSG Block	2021-22	Provisional 2022-23	Potential Change	
			£	%
Schools Block	£202,622,277	£208,507,566	£5,885,289	2.90%
HN Block	£40,831,888	£43,923,780	£3,091,892	7.57%
Central School Services Block	£2,757,343	£2,460,034	-£297,309	-10.78%
EY not yet available yet for 22/23	£17,593,993	-	-	-

It should be stressed that both these figures and the indicative school figures supplied as an Appendix, will be updated with reference to the October 2021 School Census data when the final figures are released in late December.

Given the Government has re-affirmed its commitment to move to the NFF, and that the majority of Northumberland's Funding Formula values are in line with NFF rates, it is believed that these figures should remain in line with NFF for 2022/23.

The only other formula value differing from the NFF is Free School Meals (FSM) at both Primary and Secondary, School Forum agreed to continue to pay at a level over NFF last year due to

changes in the qualifying date used for pupil premium. This will continue to move towards NFF Values depending on the overall level of funding available. The initial assumption in line with the figures in the table at Appendix A is that the NFF rates will be used, in line with the 2 step approach agreed previously.

As reflected in the draft minutes of the Funding Formula Committee, the proposal to move towards the full adoption of NFF Values over two years, in two equal steps, in line with that potential 2022/23 deadline was recommended by the group to be the approach Northumberland should take. The estimated available Schools Block DSG of £201.8 million would also support this approach, adopting the funding values in col (g) in the above table.

5. Minimum Per Pupil Funding (MPPF)

The impact of MPPF was highlighted last year as an influential factor in the 2021/22 formula, being estimated to account for the distribution of £2.6 million due primarily to the 6.67% increase in the primary level MPPF. It should be noted that the 2022/23 increase is 2% for both primary and secondary. Using last year's data, it is estimated that 15 First and Primary, 5 Middle and 3 High Schools should benefit from this in 2022/23, based on the historic data. This is estimated to account for £2.451 million of Schools Block funding.

6. Sparsity

A separate briefing on Sparsity is provided elsewhere on the agenda. It should be noted that the current 2022/23 APT tool has not been updated to reflect the change to road distances in the calculations. This affects both Northumberland's overall total and the individual schools benefitting from the change in methodology.

7. Transfer from Schools Block

It is the local authority's intention to request a transfer from the Schools Block. While a 1% transfer was agreed for 2018/19 and 2019/20 respectively, given the reduction in the level of the High Needs deficit, and increased levels of funding for High Needs as well as the Schools Block, the figure requested for 2020/21 was reduced to 0.5% for 2020/21 and 2021/22. 0.5% would be the maximum figure requested for 2022/23, depending on the final funding figures. This transfer would support the continued provision of the Inclusive Education Services offer, that was previously funded via SLA charges. The cost of the Inclusive Education Service is £2.055 million; the maximum funding to be transferred based on the 2022/23 Provisional Settlement figure would be £1.043 million, with the balance being funded via the High Needs Block.

Further information will be provided to the January and February meetings in relation to this.

8. Central Services Block

It should be noted that there has been a further significant fall in 2021/22 Central Services Block funding. While there is a small 1.13% increase in element of the CSSB for ongoing responsibilities, there is a further 20% reduction in the funding for historic commitments, resulting in a 10.2% fall overall.

	2021/22 (final)	2022/23 (provisional)	Change	
			£	%
Ongoing Responsibilities	£1,452,343	£1,416,034	- £36,309	- 2.5%
Historic Responsibilities	£1,305,000	£1,044,000	-£261,000	-20.0%
TOTAL CSSB	£ 2,757,343	£ 2,460,034	-£297,309	-10.8%

Discussions last year with the ESFA mitigated the impact of the reduction in the Historic Commitment elements as this figure no longer covered the Capital Financing and Historic Retirement costs of £1,305,000. However, this element will continue to unwind. The fall in the element for ongoing responsibilities in 2022/23 is a concern as the forecast shortfall will fall to Northumberland as a budget pressure for 2022/23.

9. Early Years Block

No information for Northumberland is available yet in relation to Early Years funding, in line with previous years. Details of the 2022/23 EY funding will be received in December together with the rest of the DSG information for 2022/23.

10. De-delegation

De-delegation is the process by which the relevant maintained school members of Schools Forum can agree to have funding deducted at source from maintained schools for certain services as specified by the DfE. For academies to access these services, they will need to agree to buy in, either on an individual or a multi academy trust level.

For 2021/22, de-delegation was agreed in respect of the following services:

- Contingency for costs arising from reorganisation or restructuring;
- Free School Meal eligibility checking;
- Trade union facility time; and
- Support to underperforming ethnic minority groups and bilingual learners;

It is anticipated that de-delegation will again be sought in respect of these services.

For 2022/23 the DfE has recently published details of a consultation as to how School Improvement functions will be funded in the future. Details are available [HERE](#). The consultation is open until 26 November 2021. Currently in Northumberland this is funded via a combination of DfE grant and SLA income. The proposal is that School Improvement Grant will be cut by 50% for 2022/23 and removed with effect from 2023/24, and in its place the school funding regulations would be amended to allow LAs to raise funding from School Improvement via de-delegation, requiring the agreement of Schools Forum maintained school

representatives. Further information will again be provided to the January and February meetings in relation to this.

11. Other Information

In the context of this report Schools Forum are reminded of other information previously highlighted on the agenda, and previously considered by the Formula Funding Committee on 03 November. Support was reiterated for the previously agreed two phase move to NFF rates and according to financial availability:

- We should if possible, establish MFG at 2%, thereby giving the largest possible per pupil increase to all schools;
- It was agreed that we could continue to use capping and scaling for 2022/23 to ensure affordability as we move towards NFF;
- A mobility element should be included, at a reduced 50% value in line with the general phased approach;
- The use of a Falling Rolls fund should be further investigated.

This will be reflected in the principles used to establish Northumberland's Funding Values for 2022/23 once the 2022/23 allocations are known in late December, and as is reflected in recommendation 2 (b) of this report.

12. Next Steps:

Following any comments received today, the intention is also to consult with schools ahead of the final budget setting report to Cabinet. A copy of the draft consultation paper is attached for your consideration in Appendix C. The results of the consultation and final recommendations to Cabinet will be reported back to the January 2022 Schools Forum meeting.

Because of the short timescales between receiving the final 2022/23 DSG settlement in December, the preparation of a report to the Cabinet meeting on 11 January 2022 and the submission of the final figures to the ESFA by 21 January 2022, delegated powers are sought for the Executive Director of Adult Social Care and Children's Services to set the final figures, in line with the principles and illustrative figures outlined in this report.

As reflected in the recommendations the Cabinet report will seek delegated powers to agree the final values, there will be reported to the Schools Forum meeting on 19 January 2022 prior to submission to the ESFA by 21 January 2022.

13. Summary and Conclusions:

The support of Schools Forum in relation to 22/23 School Funding is requested in line with the recommendations in section 2 of this report, with regard to the principles to be adopted for the setting of the DSG in 2022/23. Further information will be provided to the January and February 2021 meetings once the final 2022/23 DSG settlement has been received in December 2021, but the views of School Forum are required at this stage to enable the appropriate report seeking approval to go to Cabinet in January 2022, as has been the case in previous years.

Bruce Parvin

Education and Skills Funding Manager

02 November 2021

**COMPARISON OF FINAL 2021-21 AND POTENTIAL 2022-23 FORMULA VALUES FOR NFF
AND NORTHUMBERLAND**

Factor (all figures £)	NFF Values (As published July 2020) 2021/22	Final NCC Values 2021/22	2022-23 NFF Values (As published July 2021)	Potential NCC Values 22-23	Change in NFF Values 21/22 to 22/23 %	Change in NCC Values 21/22 to 22/23 %
AWPU Primary	3,123	3,154	3,217	3,217	3.01%	2.00%
KS3	4,404	4,404	4,536	4,536	3.00%	3.00%
KS4	4,963	5,064	5,112	5,112	3.00%	0.95%
Lump Sum Primary	117,800	117,800	121,300	121,300	2.97%	2.97%
Middle	117,800	117,800	121,300	121,300	2.97%	2.97%
High/Secondary	117,800	117,800	121,300	121,300	2.97%	2.97%
Deprivation - Free School Meals Primary	460	570	470	470	2.17%	-17.54%
Secondary	460	570	470	470	2.17%	-17.54%
Deprivation – FSM6 Primary	575	575	590	590	2.61%	2.61%
Secondary	840	840	865	865	2.98%	2.98%
Deprivation – IDACI:						
Primary Band F	215	215	220	220	2.33%	2.33%
Band E	260	260	270	270	3.85%	3.85%
Band D	410	410	420	420	2.44%	2.44%
Band C	445	445	460	460	3.37%	3.37%
Band B	475	475	490	490	3.16%	3.16%
Band A	620	620	640	640	3.23%	3.23%
Secondary Band F	310	310	320	320	3.23%	3.23%
Band E	415	415	425	425	2.41%	2.41%
Band D	580	580	595	595	2.59%	2.59%
Band C	630	630	650	650	3.17%	3.17%
Band B	680	680	700	700	2.94%	2.94%
Band A	865	865	890	890	2.89%	2.89%
Low Attainment Primary	1,095	840	1,130	1,130	3.20%	34.52%
Secondary	1,660	1,660	1,710	1,710	3.01%	3.01%
Mobility : Primary	900	0	925	463	2.78%	-
Secondary	1,290	0	1,330	665	3.10%	-
EAL Primary	550	550	565	565	2.73%	2.73%
Secondary	1,485	1,485	1,530	1,530	3.03%	3.03%
Sparsity (max): Primary	45,000	45,000	55,000	55,000	22.22%	22.22%
Middle	70,000	70,000	80,000	80,000	14.29%	14.29%
Secondary/All Through	70,000	70,000	80,000	80,000	14.29%	14.29%
Totals Adjusted by Capping and Scaling rates:						
Capping		4.65%				
Scaling		50%				
Minimum Funding Guarantee level		2%				
Primary Minimum Per Pupil Funding	4180		4265		2.03%	
Secondary Minimum Per Pupil Funding	5415		5525		2.03%	

Illustrative 2022/23 School Level DSG based on October 2020 data – see separate schedule
This schedule does not reflect the updated Sparsity methodology using road distance measures.
Pupil number are also unadjusted in respect of any reorganisation or restructuring issues.

National Funding Formula (NFF): Update and 2022/23 School Funding Consultation

Previously Northumberland County Council consulted on its approach to the introduction of the National Funding Formula (NFF) in Northumberland, following discussions at Schools Forum. The results of these discussions have consistently been to move in a phased or gradual approach to NFF values, reflecting the fact that historically Northumberland has maintained some values that were different to the NFF values. In December 2020, Schools Forum and subsequently Schools themselves supported a two-step approach towards the adoption of NFF values. The results of the consultation were reported to Schools Forum in January 2021 and are available [HERE](#).

Earlier in 2021, the Department for Education consulted on the completion of the NFF reforms (closing date 30 September 2021; the response has not yet been published). In the consultation paper, while re-affirming the intention to move to a hard formula, the Department for Education (DfE) acknowledges the disruption caused by the covid pandemic and the need for “*careful implementation and transition to avoid any unexpected disruption.*” (P12)

Consequently, no firm fixed target date is proposed by the DfE. Other information includes:

- Minimum per pupil funding (MPPF) levels continue to be determined centrally, the 2022/23 figures are £4,265 (primary) and £5,525 (secondary):
- In 2022/23 Local authorities continue to set a Minimum Funding Guarantee (MFG), which protects schools on a per pupil basis from significant year to year changes in pupil characteristics (e.g. fall in FSM numbers) and provide a baseline level of increase in per pupil funding. For 2021/22 Northumberland set a figure of 2%, within the permitted range of +0.5% to +2%. For 2021/23, the permitted range has again been set at +0.5% to +2%.
- With the approval of Schools Forum, local authorities can transfer up to 0.5% from the Schools Block to the High Needs Block; to transfer more than this, a request must be made to the Department for Education.

Latest guidance from the DfE has reiterated their intention to introduce the “hard” NFF, there is no specific timescale currently for this but the DfE expect LAs to move towards NFF values. It has been confirmed that for 2022/23 local authorities will continue to have discretion over their schools funding formula, and in consultation, will determine values and allocations in their area. Therefore, we would be grateful if you would review the information set out in this questionnaire and complete the questions where appropriate.

Further supporting information is available on the Council website at:

<http://www.northumberland.gov.uk/Education/Schools/Consultations.aspx#schoolconsultations>

This includes:

- November 2021 Schools Forum report on the National Funding Formula
- November 2021 Schools Forum report on Special Educational Needs (SEN)

Schools Forum agendas, minutes and reports are also available on the Council website at:

<https://www.northumberland.gov.uk/Education/Professionals/Forum.aspx>

Responses need to be received no later than **12.00 noon on Monday 13 December 2021**. Due to reporting deadlines in line with Department for Education requirements for the submission of information, responses received after this closing date will not be considered.

Thank you in advance for your assistance.

QUESTION 1: INTRODUCTION OF MOBILITY INTO NORTHUMBERLANDS FUNDING FORMULA

Mobility is a factor with the NFF but has not to date featured in the Northumberland Funding Formula. As we move closer to the NFF we must consider whether to introduce Mobility as a formula factor, and how.

The mobility factor allocates funding to schools with a high proportion of pupils with an entry date in the last 3 years which is not typical. For year groups 1 to 11, 'typical' means that the first census on

which a pupil is recorded as attending the school (or its predecessors) is the October census.

'Not typical' means that the first census a pupil is recorded as attending the school is a January or May census.

For the reception year, 'typical' means the first census in October or January. To be eligible for mobility funding, the proportion of mobile pupils in a school must be above the threshold of 6%.

The NFF value for qualifying pupil in 2022/23 is £925 for primary, and £1,330 for secondary school pupils.

The proposal supported by Schools Forum was to introduce mobility on a phased basis, using 50% of the NFF Value for 2022/23. This is consistent with the approach taken around other variations previously and allows us to assess the impact of the use of mobility in Northumberland.

Question 1.1: Do you support the introduction of a mobility factor into the Northumberland Schools Funding Formula for 2022/23, in order to move closer to the NFF, as supported by Schools Forum?

☐ **A: YES**

☐ **B: NO**

Question 1.2: How should the mobility factor be introduced

☐ **A: Phased 2 Step**

☐ **B: Full NFF**

QUESTION 2: CAPPING AND SCALING INCREASES

The use of capping and scaling is a mechanism by which different increases under new formula values are averaged out in order to limit some gains and provide more funding for general distribution to schools via the formula values. Without the use of capping and scaling, formula funding values would need to be set at lower values. Northumberland used capping and scaling for the School Block DSG, setting these values at 4% and 50% respectively. This meant that any gains by Schools over 4% were reduced by 50% and redistributed via the funding mechanism. As Northumberland moves closer to the NFF, the need to use Capping and Scaling should reduce, however it remains a useful tool to ensure the distribution of a general level of increase via the funding formula.

Do you support the potential use of capping and scaling as part of the 2022/2 School Budget setting process?

☐ **YES**

☐ **NO**

QUESTION 3: Minimum Funding Guarantee (MFG)

The MFG is a way of giving schools a guaranteed minimum increase in funding per pupil each year. It works by comparing a school's level of funding per pupil from one year to the next on a like for like basis, and in such a way as to exclude funding that could distort the per pupil value that is the basis for the guarantee. The baseline for the calculation is intended to cover as much of a school's budget as possible but does not include rates (because they are funded in the formula on actuals) and lump sum allocations because they do not relate to pupil numbers. The MFG is how the ESFA protects individual schools from excessive year to year changes or falls in their formula funding (e.g. as a result of reducing levels of deprivation within a school). In 2021/22 Northumberland set its MFG at +2%, on a range of +0.5% and +2.0%. In 2021/22 Schools Forum agreed with the proposal to set MFG at the maximum 2%, in order to increase the funding for those schools receiving the lowest level of per pupil funding increase

At what level do you believe Northumberland's MFG should be set for 2022/23?

- ☐ 0.5% to 0.9%
- ☐ 1.0% to 1.4%
- ☐ 1.5% to 1.9%
- ☐ 2.0%

QUESTION 5 – 0.5% Transfer from the Schools Block

It is the local authority's intention to request a transfer from the Schools Block to the High Needs Block for 2021/22. While a 1% transfer was agreed for 2018/19 and 2019/20 respectively, given the reduction in the level of the High Needs deficit and increased levels of funding for High Needs as well as the Schools Block, the figure requested for 2020/21 was reduced to 0.5% for 2021/22. It should also be noted that the element in respect of the Teachers Pay and Pensions Grants in the Schools Block figure would not be included in respect of the 0.5% calculation.

This transfer would enable investment in the following areas:

- Continued provision of the new Inclusive Education Services offer, as reported within the SEN paper;
- Reduction of the High Needs deficit; and

Do you agree to the Council's proposal to transfer up to 0.5% from the Schools Block to the High Needs block for the financial year 2022/23?

- ☐ Yes
- ☐ No

QUESTION 6 - INTRODUCTION OF A FALLING ROLLS FUND

From the School Block, the DfE permits the use of School Block funding for certain specific purposes. An example of this is the Growth Fund, which was agreed with School Forum and has been used previously. The DfE also permits School Block funding to be used to create a Falling Rolls Fund, Guidance is provided in relation to both Growth and Falling Rolls funds by the ESFA which is available [HERE](#).

The key requirements for Falling Rolls Fund are:

- **support is available only to schools judged good or outstanding, and**
- **local planning data show the surplus places will be needed within the next three financial years.**

It is anticipated that further clear criteria would need to be established and applications would be considered by Schools Forum or its Formula Funding Committee from schools who believe that they meet the criteria.

On 17 November 2021, School Forum agreed that the establishment of a falling rolls fund should be investigated further.

Do you agree to the proposal that the establishment of a falling rolls fund should be investigated for Northumberland subject to funding being available?

- ☐ Yes
☐ No

FURTHER COMMENTS

Please use the box below for any other comments that you have in relation to the implementation of the NFF or this consultation exercise:

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APPENDIX C

LAESTAB	School Name	21-22 Post MFG Budget	22/23 Modelling using NFF	Change 21-22 to 22-23(£)	Change 21-22 to 22-23(%)
Total		£201,972,083	£207,755,571		
9292105	Linton Primary School	£244,818.34	£279,723.21	34,904.87	14.26%
9293920	Norham St Ceolwulfs CofE Controlled F	£252,199.13	£283,544.07	31,344.93	12.43%
9293922	Lowick Church of England Voluntary Co	£259,925.67	£288,177.62	28,251.95	10.87%
9293349	Greenhead Church of England Primary	£359,845.99	£397,434.59	37,588.59	10.45%
9293548	Wark Church of England Primary Scho	£306,940.69	£337,930.81	30,990.12	10.10%
9293542	Tritlington Church of England First Sch	£283,546.57	£312,076.40	28,529.83	10.06%
9292209	Otterburn Primary School	£336,598.46	£370,396.32	33,797.86	10.04%
9292234	Greenhaugh Primary School	£256,575.43	£281,621.78	25,046.35	9.76%
9295201	Thropton Village First School	£266,735.54	£292,567.50	25,831.96	9.68%
9293492	Newbrough Church of England Primary	£391,584.82	£428,849.53	37,264.72	9.52%
9293423	Harbottle Church of England First Scho	£236,573.77	£258,785.59	22,211.81	9.39%
9293065	Chollerton Church of England Aided Fi	£283,529.95	£310,117.12	26,587.17	9.38%
9293408	Embleton Vincent Edwards Church of E	£285,659.23	£311,960.40	26,301.17	9.21%
9292053	Branton Community Primary School	£188,564.91	£205,341.50	16,776.59	8.90%
9292043	Bellingham Primary School	£364,030.17	£396,224.11	32,193.94	8.84%
9293411	Hugh Joicey Church of England First Sc	£345,747.25	£375,809.59	30,062.34	8.69%
9292246	Cambo First School	£307,024.86	£333,261.19	26,236.33	8.55%
9293443	Whitley Chapel Church of England First	£264,660.96	£287,274.44	22,613.48	8.54%
9293403	Ellingham Church of England Aided Pri	£365,460.86	£396,429.78	30,968.92	8.47%
9292003	Whitfield CofE Primary School	£243,398.94	£263,348.92	19,949.99	8.20%
9292236	Slaley First School	£291,733.46	£315,515.87	23,782.41	8.15%
9293135	Henshaw Church of England Voluntary	£403,418.75	£436,225.65	32,806.90	8.13%
9293447	Holy Island Church of England First Sch	£169,415.20	£183,041.20	13,626.00	8.04%
9293560	Whalton Church of England Aided Prim	£308,621.12	£333,147.06	24,525.94	7.95%
9292005	Shaftoe Trust Academy	£475,079.31	£512,566.19	37,486.87	7.89%
9292372	Scrammerston First School	£383,817.68	£413,948.23	30,130.55	7.85%
9292044	Belsay Primary School	£444,688.58	£479,236.98	34,548.40	7.77%
9292325	Belford Primary School	£442,654.02	£475,976.05	33,322.03	7.53%
9292270	Whittonstall First School	£360,741.55	£387,818.03	27,076.48	7.51%
9292138	Stamfordham Primary School	£438,666.28	£471,513.51	32,847.23	7.49%
9292293	Swarland Primary School	£460,589.16	£494,024.56	33,435.40	7.26%
9293355	Broomhaugh Church of England First S	£374,352.59	£401,369.48	27,016.89	7.22%
9292207	Seahouses Primary School	£470,975.12	£504,380.41	33,405.28	7.09%
9293046	Berwick St Mary's Church of England F	£422,168.49	£450,346.95	28,178.46	6.67%
9292224	Rothbury First School	£414,168.45	£441,581.28	27,412.84	6.62%
9293095	Felton Church of England Primary Scho	£462,285.52	£492,806.40	30,520.88	6.60%
9294361	Bellingham Middle School and Sports C	£557,659.88	£594,278.85	36,618.97	6.57%
9292254	Kielder Primary School and Nursery	£213,067.09	£226,731.74	13,664.65	6.41%
9292525	Hipsburn Primary School	£481,545.07	£511,878.89	30,333.83	6.30%
9293264	Whittingham Church of England Prima	£462,317.82	£491,267.67	28,949.85	6.26%
9292098	Broomhill First School	£370,657.08	£393,580.59	22,923.51	6.18%
9293173	Longhoughton Church of England Prim	£484,905.88	£513,240.10	28,334.22	5.84%
9294370	Glendale Middle School	£697,040.71	£737,343.36	40,302.64	5.78%
9292001	Adderlane Academy	£524,900.61	£553,154.23	28,253.62	5.38%
9292103	Ellington Primary School	£849,538.87	£893,537.23	43,998.35	5.18%
9293347	Longhorsley St Helen's Church of Engla	£402,455.00	£423,267.08	20,812.08	5.17%
9292007	Haltwhistle Primary Academy	£930,090.93	£977,708.69	47,617.75	5.12%
9293312	St Michael's Church of England Primar	£539,660.70	£567,167.39	27,506.69	5.10%
9292229	New Hartley First School	£594,566.01	£624,443.81	29,877.80	5.03%
9293923	Grange View Church of England Volunt	£508,729.03	£533,965.94	25,236.91	4.96%
9292009	Allendale Primary School	£549,913.18	£576,908.45	26,995.27	4.91%
9292277	Wooler First School	£537,738.02	£563,449.67	25,711.65	4.78%
9292091	Holywell Village First School	£651,002.59	£681,953.90	30,951.31	4.75%
9292212	Pegswood Primary School	£764,745.37	£800,834.96	36,089.59	4.72%

LAESTAB	School Name	21-22 Post MFG Budget	22/23 Modelling using NFF	Change 21-22 to 22-23(£)	Change 21-22 to 22-23(%)
Total		£201,972,083	£207,755,571		
9292281	Shilbottle Primary School	£560,573.61	£586,894.77	26,321.16	4.70%
9292217	Prudhoe Castle First School	£348,828.93	£365,077.54	16,248.62	4.66%
9292074	Cramlington Eastlea Primary School	£806,174.18	£843,691.59	37,517.42	4.65%
9292046	Spittal Community School	£700,356.80	£732,728.49	32,371.69	4.62%
9294802	Dr Thomlinson Church of England Mid	£1,127,325.39	£1,175,455.20	48,129.81	4.27%
9292041	Stead Lane Primary School	£1,005,947.10	£1,048,628.48	42,681.38	4.24%
9292323	Mowbray Primary School	£1,107,271.79	£1,154,090.49	46,818.70	4.23%
9293732	St Bede's Roman Catholic Voluntary Ai	£876,480.95	£912,023.25	35,542.30	4.06%
9292076	Beaconhill Community Primary School	£967,166.22	£1,005,855.33	38,689.11	4.00%
9292050	Tweedmouth Prior Park First School	£661,615.32	£687,446.75	25,831.43	3.90%
9293713	St Paul's RC Voluntary Aided Primary S	£769,768.87	£798,913.29	29,144.41	3.79%
9292019	Amble First School	£581,775.65	£603,748.79	21,973.14	3.78%
9292010	Croftway Academy	£1,659,451.42	£1,720,901.92	61,450.50	3.70%
9292268	Seaton Sluice First School	£659,857.01	£683,561.05	23,704.04	3.59%
9292232	Seghill First School	£553,569.88	£573,402.19	19,832.31	3.58%
9292006	NCEA Bishop's Primary School	£5,926,219.30	£6,135,202.15	208,982.86	3.53%
9294654	St Joseph's Roman Catholic Voluntary	£1,387,207.53	£1,435,770.01	48,562.48	3.50%
9292142	Hexham First School	£529,172.26	£547,687.80	18,515.55	3.50%
9293367	Corbridge Church of England Aided Fir	£557,394.58	£576,797.61	19,403.03	3.48%
9292531	Central Primary School	£3,082,573.04	£3,189,724.00	107,150.96	3.48%
9292228	Seaton Delaval First School	£845,401.96	£874,652.74	29,250.78	3.46%
9292219	Mickley First School	£412,433.86	£426,669.17	14,235.31	3.45%
9292008	Malvin's Close Academy	£1,794,602.37	£1,856,158.05	61,555.68	3.43%
9292047	Tweedmouth West First School	£574,721.20	£594,189.10	19,467.91	3.39%
9293746	St Cuthbert's Roman Catholic Voluntar	£393,122.51	£406,380.90	13,258.39	3.37%
9294198	Highfield Middle School	£1,938,397.17	£2,003,063.91	64,666.74	3.34%
9292278	Wylam First School	£558,675.77	£577,246.92	18,571.15	3.32%
9293917	St Matthew's Catholic Primary School	£617,951.03	£638,269.75	20,318.72	3.29%
9293770	Ss Peter and Paul's Catholic Primary Ac	£837,179.44	£864,638.99	27,459.55	3.28%
9293840	St Mary's Roman Catholic Voluntary Ai	£533,436.04	£550,807.13	17,371.09	3.26%
9292415	Newsham Primary School	£1,823,939.69	£1,882,775.80	58,836.11	3.23%
9293726	St Aidan's Roman Catholic Voluntary A	£968,288.93	£999,347.91	31,058.98	3.21%
9293888	St Robert's Roman Catholic Voluntary	£628,557.72	£648,526.47	19,968.75	3.18%
9292033	Stakeford Primary School	£717,103.45	£739,838.98	22,735.53	3.17%
9292239	Stannington First School	£544,367.02	£561,509.18	17,142.17	3.15%
9292000	Cramlington Village Primary School	£855,109.37	£881,735.07	26,625.70	3.11%
9292360	Morpeth Stobhillgate First School	£630,265.07	£649,868.89	19,603.82	3.11%
9292370	Ringway Primary School	£834,811.83	£860,378.02	25,566.19	3.06%
9292220	Prudhoe West Academy	£871,675.11	£898,263.48	26,588.38	3.05%
9293711	St Wilfrid's Roman Catholic Voluntary	£1,227,599.35	£1,264,925.04	37,325.69	3.04%
9294161	Seaton Sluice Middle School	£1,622,200.20	£1,671,218.89	49,018.68	3.02%
9294332	Tweedmouth Community Middle Scho	£1,713,274.25	£1,764,790.93	51,516.68	3.01%
9293210	Ovingham Church of England First Scho	£572,608.83	£589,795.05	17,186.22	3.00%
9294439	James Calvert Spence College	£3,896,796.56	£4,013,208.01	116,411.45	2.99%
9292405	Morpeth Road Academy	£1,698,206.85	£1,748,914.81	50,707.96	2.99%
9292397	Horton Grange Primary School	£1,927,720.76	£1,984,922.65	57,201.88	2.97%
9292037	Choppington Primary School	£564,438.54	£580,825.97	16,387.43	2.90%
9293346	Holy Trinity Church of England First Sch	£614,409.76	£631,987.57	17,577.81	2.86%
9292032	Bedlington Station Primary School	£954,793.00	£981,824.59	27,031.59	2.83%
9292056	Broomley First School	£579,144.00	£594,669.46	15,525.46	2.68%
9292018	Amble Links First School	£672,294.20	£690,139.93	17,845.73	2.65%
9294150	Ponteland Community Primary School	£940,496.41	£962,870.10	22,373.70	2.38%
9294404	Berwick Middle School	£1,597,427.60	£1,634,121.13	36,693.53	2.30%
9296905	Bede Academy	£8,389,136.98	£8,579,109.30	189,972.32	2.26%
9292407	New Delaval Primary School	£1,144,761.97	£1,170,599.34	25,837.38	2.26%

LAESTAB	School Name	21-22 Post MFG Budget	22/23 Modelling using NFF	Change 21-22 to 22-23(£)	Change 21-22 to 22-23(%)
Total		£201,972,083	£207,755,571		
9294130	Haydon Bridge Community High School	£2,087,556.45	£2,133,951.11	46,394.66	2.22%
9293133	Heddon-on-the-Wall, St Andrew's Church of England Primary School	£830,686.40	£847,516.40	16,830.00	2.03%
9294309	Morpeth Newminster Middle School	£2,446,911.30	£2,496,475.80	49,564.50	2.03%
9294000	Morpeth Chantry Middle School	£2,574,255.80	£2,626,398.80	52,143.00	2.03%
9292354	Abbeyfields First School	£1,238,220.00	£1,263,295.00	25,075.00	2.03%
9293487	Morpeth All Saints Church of England Primary School	£864,971.20	£882,481.20	17,510.00	2.02%
9294441	Hexham Middle School	£2,185,592.10	£2,229,808.60	44,216.50	2.02%
9294199	Ovingham Middle School	£1,524,767.70	£1,555,614.20	30,846.50	2.02%
9294800	Richard Coates Church of England Primary School	£1,399,722.40	£1,428,027.40	28,305.00	2.02%
9294417	Queen Elizabeth High School	£5,136,383.00	£5,240,149.00	103,766.00	2.02%
9292215	Ponteland Primary School	£1,755,143.20	£1,790,588.20	35,445.00	2.02%
9294501	The King Edward VI Academy	£5,457,073.67	£5,567,149.00	110,075.33	2.02%
9292526	Darras Hall Primary School	£1,880,345.00	£1,918,255.00	37,910.00	2.02%
9292077	Cramlington Shanklea Primary School	£1,365,920.00	£1,393,290.00	27,370.00	2.00%
9294079	Corbridge Middle School	£1,694,492.50	£1,728,395.00	33,902.50	2.00%
9293918	Craggside CofE Controlled Primary School	£1,512,975.47	£1,543,235.47	30,260.00	2.00%
9292015	Swansfield Park Primary School	£1,391,810.00	£1,419,605.00	27,795.00	2.00%
9292299	The Sele First School	£1,571,604.00	£1,602,969.00	31,365.00	2.00%
9292527	Burnside Primary School	£1,598,052.00	£1,629,757.00	31,705.00	1.98%
9292530	Cramlington Northburn Primary School	£1,286,172.00	£1,311,587.00	25,415.00	1.98%
9292291	Bothal Primary School	£2,519,752.60	£2,569,477.60	49,725.00	1.97%
9294424	Cramlington Learning Village	£9,602,438.72	£9,790,961.74	188,523.01	1.96%
9292529	Hareside Primary School	£1,571,016.00	£1,601,786.00	30,770.00	1.96%
9294632	St Benet Biscop Catholic Academy	£6,088,410.55	£6,207,279.67	118,869.12	1.95%
9294426	Ponteland High School	£7,085,673.15	£7,223,823.98	138,150.82	1.95%
9292185	Morpeth First School	£1,262,292.00	£1,286,857.00	24,565.00	1.95%
9294005	Ashington Academy	£5,461,271.54	£5,567,477.05	106,205.51	1.94%
9294002	The Blyth Academy	£5,047,303.96	£5,144,944.08	97,640.12	1.93%
9294008	Bedlington Academy	£4,333,376.41	£4,416,943.42	83,567.01	1.93%
9296906	NCEA Duke's Secondary School	£5,605,247.89	£5,713,339.65	108,091.76	1.93%
9294369	Prudhoe Community High School	£3,313,823.68	£3,376,952.23	63,128.55	1.91%
9294437	Berwick Academy	£2,422,605.70	£2,468,211.97	45,606.27	1.88%
9294438	The Duchess's Community High School	£7,183,198.93	£7,318,238.23	135,039.29	1.88%
9295400	Astley Community High School	£2,593,171.31	£2,641,113.70	47,942.39	1.85%
9294168	Meadowdale Academy	£1,204,790.57	£1,226,270.94	21,480.37	1.78%
9293550	NCEA Warkworth Church of England Primary School	£583,468.86	£592,670.25	9,201.39	1.58%
9292035	Cambois Primary School	£470,700.50	£477,576.83	6,876.32	1.46%
9292101	Red Row First School	£486,339.70	£493,415.94	7,076.24	1.46%
9292227	Beaufront First School	£396,421.84	£401,826.47	5,404.63	1.36%
9292002	Acomb First School	£344,344.30	£348,761.67	4,417.37	1.28%
9293454	Humshaugh Church of England First School	£295,789.69	£298,846.32	3,056.63	1.03%
9294162	Whytrig Community Middle School	£1,349,596.04	£1,328,944.32	-20,651.72	-1.53%
9292030	Bedlington West End First School	£1,097,124.09	£1,078,437.74	-18,686.35	-1.70%
9293333	Bedlington Whitley Memorial Church of England Primary School	£1,199,861.64	£1,147,937.31	-51,924.33	-4.33%

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Northumberland County Council

SCHOOLS' FORUM

Agenda Item 11

17 November 2021

2021-2022 Work Programme and Meeting Dates

Wednesday 29 September 2021: 9.30- 12.00 (Virtual Meeting)

National Funding Formula Update
Schools Capital Update

Wednesday 17 November 2021 9.30-12.00 (Virtual Meeting)

NFF - Formula Funding – Formal Consultation
SEN Update

Wednesday 19 January 2022: 9.30-12.00 (Virtual Meeting)

Finalisation of the Formula and the Schools Block for 2021/22
De-delegation decisions for 2021/22

Wednesday 16 February 2022: 9.30-12.00 (Virtual Meeting)

Setting the DSG budget for 2021/22

Wednesday 06 July 2022: 9.30-12.00 (Virtual Meeting)

Review of Schools Forum Membership
DSG Provisional Outturn
Scheme for Financing Schools

**Date for Formula Funding Committee – Chair – Ben Watson
To Be Confirmed**

**Date for High Needs Committee: Chair – Graham Wilkins
Wednesday 01 December 2021 (*provisional*)**

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