



# Northumberland

## County Council

**Your ref:**

**Our ref:**

**Enquiries to:** Luke Dixon

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**Date:** 12<sup>th</sup> February 2025

Dear Sir or Madam,

A virtual meeting of the **SCHOOLS' FORUM** will be held on **WEDNESDAY, 19 FEBRUARY 2025 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

Luke Dixon  
Clerk to the Forum

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

**Copy to Audrey Kingham, Executive Director for Children, Young People & Education  
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.	<b>MEMBERSHIP AND MEMBERSHIP UPDATE</b>	Information
2.	<b>APOLOGIES FOR ABSENCE</b>	Information
3.	<b>DISCLOSURES OF INTERESTS (IF ANY)</b>	Information
4.	<b>MINUTES AND MATTERS ARISING (Pages 3 - 10)</b> Minutes of the meeting of the Schools' Forum held on Wednesday 22nd January 2025, as circulated, be agreed as a true record and signed by the Chair.	Action
5.	<b>COMMUNICATION (Pages 11 - 14)</b> Draft Minutes High Needs Committee 05 February 2025 (attached)	Decision
6.	<b>SETTING THE 2025/26 DEDICATED SCHOOLS GRANT</b> (to follow)	Decision
7.	<b>2025 WORK PROGRAMME AND MEETING DATES (ATTACHED) (Pages 15 - 16)</b>	Information
8.	<b>ANY OTHER BUSINESS</b>	Information
9.	<b>DATE OF NEXT MEETING</b> The next scheduled meeting of the Schools' Forum is <b>Wednesday 16<sup>th</sup> July 2025</b>	Information

## NORTHUMBERLAND COUNTY COUNCIL

### SCHOOLS' FORUM

At a meeting of the Schools' Forum on Wednesday, 22 January 2025 at 9.30 a.m. held virtually.

#### PRESENT

A. Hardie, NCEA  
(Chair, in the Chair)

#### Headteacher Representatives

M. Deane-Hall, Wooler and Glendale  
Middle School

A. Mead, Cramlington Hillcrest  
School

J. Androit, James Calvert Spence  
Collage

#### Governor Representatives

B. Mansfield, Newbrough CE Primary  
School  
B. Watson, St Robert's RC First  
School

K. Faulkner, Collingwood School and  
Media Arts College  
G. Wilkins, St Wilfrid's RC Primary  
School

#### Academies Representatives

G Atkins, Hadrian Learning Trust  
B. Reed, Gilbert Ward Academy

J. Wilson, The Duchess's  
Community High School

**Roman Catholic Diocese – Vacant Post**

**EYDCP-PVI –**

**16-19 Provider of Education Representative – W. Stephenson**

**Trades Union Representative – Vacant Post**

Councillor R. Wearmouth (observer)

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## OFFICERS IN ATTENDANCE

S. Aviston	Head of School Organisation and Resources
L. Dixon	Assistant Democratic Officer
A. Kingham	Executive Director - Children, Young People and Education
V. McLeod	Director of Children, Young People and Families
B. Parvin	Education and Skills Business Manager
C. Street	Principal Accountant
D. Street	Director of Education, SEND and Skills

### 01. MEMBERSHIP AND MEMBERSHIP UPDATE

- 01.1 The Forum received notice of the resignation of J. Wilson, (the Duchess School). J Andriot(Headteacher - James Calvert Spence College) has expressed an interest to join Schools Forum as a maintained secondary school representative and was formally welcomed to his first Forum.

There was a vacancy for a position on the Forum as an Early Years representative. A few interests had been shown in the position however, no one had been appointed the position at that time.

### 02. APOLOGIES

- 02.1 Apologies were received from D. Cookson, A. Russell, S. Smith, J. Holmes, N. Threlfall and R. Carr.

### 03. MINUTES AND MATTERS ARISING

- 03.1 **RESOLVED** that the minutes of the meeting of the Schools' Forum held on Wednesday, 27 November 2024, as circulated, be confirmed as a true record and signed by the Chair.

### 04. COMMUNICATIONS

- 04.1 Public Accounts Committee SEN paper (Jan 2025)

B Parvin introduced the report to Forum members. The Forum agreed to an in-depth discussion would take place in the High Needs Committee meeting, scheduled for 5<sup>th</sup> February 2025 on the Public Accounts Committee SEN paper.

In response to a question, the Forum were informed that the figures on the percentage of children aged 5 to 15 with Education and Health Care (EHC) plans

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were from 2023/24 and had subsequently been updated. The percentage of new EHC plans issued within 20 weeks was around 60% in this year's figures.

It was **AGREED** that the report would go to the High Needs Committee and would be shared before the meeting start date. Key focus on the report was to take place at the High Needs Committee.

## **05. SETTING THE 2025/26 DEDICATED SCHOOLS GRANT**

05.1 B Parvin introduced the report and drew members attention to the recommendations to consider when reviewing the report.

05.2 Schools Forum had previously received reports outlining developments in relation to the National Funding Formula (NFF). The November 2024 report outlined the position to date, confirmed Northumberland's position as a local authority that currently "mirrors the NFF in all factors". The ESFA classified "mirroring the NFF" as being within 2.5% of the respective NFF Factors.

A 2-phase agreement had been made in relation to the transfer of funds from the Schools Block to the High Needs Block, involving an initial agreement of up to 0.5%, plus the potential to transfer a further 0.5% subject to the final figures received. This also required the agreement of the Secretary of State for Education. It was noted that final decisions were delegated to the Executive Director of Children, Young People and Education and The Cabinet Member for Inspiring Young People once the final figures were received in December.

The 2025/26 basic Schools Block DSG Grant figure is £244,936,033, which is some £15,226,381 (6.6%) higher than the equivalent 2024/25 figure of £229,709,652. However, this did not represent a like for like comparison, as the Teachers' Pay Additional Grant (TPAG), Teachers Pension Employer Contribution Grant (TPECG) and Core Schools Budget Grant (CSBG) have been rolled into the DSG for 2025/26.

The most significant influence on the 2025/26 Schools Block was the fall in pupil numbers in mainstream schools between reception and year 11. Numbers fell by 253 for 2024/25, but the October 2024 figures showed a further fall of 607 pupils, split between Primary and Secondary schools. Various factors contributed to the fall in pupil numbers such as birthrate or increased numbers of students in special schools.

05.3 Early Years Block (total 2025/26 EY Block funding £42 531 750)

Significant growth to funded entitlements were introduced in 2024/25 as part of the Government support package for working parents. This included the introduction of 15 hours funded childcare for working parents of children from 9 months from September 2024 increasing to 30 hours from September 2025. As a result, there were a corresponding increase in the total Early Years Block for 24/25 of 58% compared to the previous year. This growth continued at a further 40% in 25/26.

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The proposals for 2025/26 rates were based on the 3 principles:

1. Passporting as much funding to providers as possible by maximising the base rates for all.
2. Maintaining deprivation supplement for 3 and 4-year-olds to further support a substantial raise from DfE in EYPP rates and the council's equalities agenda.
3. Maintaining the Send Inclusion Fund (SENIF) budget from this year as we 'test' the full extended roll out.

A presentation was given at this point by D Street. The presentation outlined the proposed local funding formula changes for 2025/26. The proposed changes were:

- 2% retained for central costs across all age ranges (4% allowable)
- 1.5% of 3- and 4-year-old retained for deprivation supplement for this age range only (mandatory) maintaining current budget
- 0.35% across all age ranges for inclusion fund (SENIF) maintaining current budget

Any DAF funding left over would be reinvested into Early Years SEND.

The Northumberland Early Years National Funding Formula hourly rate for 3 and 4-year-olds had increased further to £5.71 (4.4%) for 2025/26.

The Northumberland Early Years National Funding Formula hourly funding rate for 2-year-olds had increased by 22p to £7.72 (2.9%) for 2025/26.

The Northumberland Early Years National Funding Formula hourly funding rate for under 2-year-olds had increased by 27p to £10.47 (2.6%) for 2025/26.

The Disability Access Fund (DAF) annual rate had been increased from £910 (2024/25) to £938 (2025/26) for all age ranges.

The funding rate figures and DfE allocation of £42,531,750 to the Early Years Block budget were **AGREED** by the Forum.

#### 05.4 High Needs Block (total 2025/26 HN Block Funding £58,749,453)

The latest indicative High Needs Block (HNB) allocation for 2025/26 was £58,749,453, a 7.9% uplift on the 2024/25 figure of £54,413,457. These figures were before deductions of £4,178,000 by the ESFA for direct funding of places by the ESFA of Pre and Post 16 in Academies, Post 16 in maintained special schools and post 16 in Independent Learning Providers (ILP) and Further Education (FE) establishments. The 2025/26 allocation after these deductions was £54,571,453. This figure included a £591,000 reduction in respect of the net import export adjustments.

Work continued on the detail of the total requirements within the High Needs Block, and it was recommended that the total 2025/26 budget for the High Needs Block was set at this time, with the detailed breakdown of that funding into the various services

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being provided to the Schools Forum meeting on 19 February 2025. Setting the overall total for the High Needs Block was necessary at this time as final decisions in relation to the Schools Block had to be made before the deadline of 22 January 2025 for submitting the APT and final mainstream school formula values to the DfE.

The Forum **AGREED** that the various budgets within the High Needs Block be set at the meeting on 15 February 2025.

#### 05.5 Schools Block (Total 2025/26 Schools Block funding £244,936,033)

A presentation was given to the Forum.

The 2025/26 Primary unit of funding (per pupil figure) was £5,774.86 (£5,333.55 in 2024/25) and the Secondary unit of funding was £7,091.74 (£6,549.43 in 2024/25), which when multiplied by the pupil numbers gives an initial allocation of £240,498,709 (£215,114,179 in 2023/24). The addition of a fixed amount in respect of Growth and Premises of £4,437,324 gives a total Schools Block of £244,936,033, before the deduction for rates of £2,851,456.

The final Schools Block settlement was some £3.7 million less than the previous indicative allocation published in November, primarily due to the fall in pupil numbers.

It had been agreed through delegated powers to seek a final transfer of 0.5% from the Schools Block to the High Needs Block. Subject to the final agreement of the ESFA to the school funding proposals for 2025/26, a transfer of £1,224,081 enabled the School Block to be distributed in line with the funding factors. As in 2024/25 this was only possible after the use of the part of the Growth funding allocation to fund in part the transfer to the High Needs block.

There was an overall School Block allocation to Northumberland of £244.936 million which meant it was not possible to make payments in line with National Funding Factors for 2025/26, which would cost an estimated £245.292 million. With a 0.5% transfer of £1.224 million, the overall shortfall would be £1.580 million. It had been necessary to review rates for Northumberland, and in setting the final rates, officers had avoided any reductions to 2024/25 formula rates for 2025/26, and increased elements such as AWPU by the same % increases across both Primary and Secondary schools.

As part of School Place Planning for September 2025, it had been identified that 2 additional year 7 classes would be necessary in Morpeth at the King Edwards VI (KEVI) Academy. In line with the Growth Policy previously ratified by Schools Forum these were to be funded at AWPU only using Growth funding for the period from September 2025 to March 2026. The cost of this is estimated to be £187,600.

The Forum **AGREED** to note the Schools Block funding and **AGREED** the growth funding of £187,600 to support two additional year 7 classes at KEVI.

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## 05.6 De-Delegation

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

A total of £422,189 was available through de-delegated funding in 4 different services:

- Contingency Fund for School Restructure and Re-organisation costs (£285,108)
- Determination of FSM Eligibility (£21,684)
- Trades Union Facility Time (£46,330)
- English as an Additional Language (EAL) services (£69,067)

The Forum **AGREED** the recommendation that on a phase-by-phase basis to the de-delegation in respect of the four services listed above for 2025/26 using the per unit values and estimated overall values.

## 05.7 Central School Service Block (Total 2025/26 CSSB funding £2,202,970)

The 2025/26 allocation for this block was £2,202,970, a figure £45,565 (2.1%) higher than the 2024/25 allocation of £2,157,405.

The overall High Needs budget will be set at £2,202,970 in line with the allocation, with the details of the budget being provided to the February Schools Forum meeting.

It was **AGREED** that the Central Schools Services Block would be set at £2.202,970.

## 06. 2025 WORK PROGRAMME AND MEETING DATES

- 06.1 B Parvin ran through the work programme and informed members of an error made for the High Needs Committee scheduled for 3<sup>rd</sup> February 2025, the meeting was scheduled for the 5<sup>th</sup> February 2025.

**AGREED** that the work programme be noted.

## 07. DATE OF NEXT MEETING

- 07.1 **AGREED** that the date of the next meeting was to be held on 19<sup>th</sup> February 2025 at 9.30am.

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CHAIR\_\_\_\_\_

DATE\_\_\_\_\_

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Northumberland  
County Council

Wellbeing and Community Health  
Services Group

Education and Skills Service

Meeting: High Needs Sub Committee of the Schools Forum  
Date: Wednesday  
Time: 09.30am  
Venue: Virtual Teams Meeting

<b>Present:</b> <b>Graham Wilkins</b> Chair and Governor at St Wilfrid’s RC Primary School <b>Graeme Atkins</b> Headteacher, Hadrian Learning Trust <b>Andrea Mead</b> Headteacher Hillcrest <b>Barry Reed</b> Headteacher, Gilbert Ward Academy <b>Richard Carr</b> , Headteacher, Northumberland PRU <b>Jo Holmes</b> , Malvin’s Close Academy <b>Richard Wearmouth</b> , Councillor <b>Jessica Conway</b> Head of SEND <b>Sarah Smith</b> Headteacher, Scremerston First School	<b>Ben Watson</b> Business Director Seaton Valley Federation <b>Peter Monaghan</b> , Northumberland College (FE Representative) <b>David Street</b> Director of Education <b>Bruce Parvin</b> Education & Skills Business Manager <b>Amanda Gilchrist</b> SEN Finance Officer <b>Abigail Russell</b> Finance Manager <b>Callum Street</b> Principal Accountant <b>James Andriot</b> Headteacher James Calvert Spence College <b>Hannah Brown</b> TU representative
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Notes Lisa Headington

1.	<b>Welcome and Introductions</b>	<b>Action</b>
2.	<b>In Attendance</b>  <b>See above</b>	
3.	<b>Apologies:</b> Sue Aviston	
4.	<b>Declaration of personal or pecuniary Interest in any agenda item.</b>  No declaration of pecuniary interest declared by members.	
5.	<b>Minutes of the previous meeting/Matters arising from Previous Minutes:</b>  The minutes of the previous meeting were noted and accepted as a true record by those present at the last meeting, G Wilkins (Chair) had submitted apologies and this was recorded.	
6.	<b>FINANCIAL UPDATE (attached)</b>  CS presented an update on the 2024/25 DSG. SEN Top Ups to mainstream and special school continues to be the largest element of this pressure, offset to a small extent by underspending in SEN Support Service teams. As a result of the High Needs pressures, the overall DSG position will move from surplus to deficit with effect from the 2024/25 year end, this is currently estimated as a £6.041 million deficit, with an in-year deficit of £7.200 million. Decrease in independent special schools though have had an Increases in social care placements have resulted in increased independent special school costs, while education placements continue to managed effectively.  The refund on personal budgets have reduced the overall personal budget forecast, but the trend is upwards and this will be much higher in future years.	

	Staffing has been a slight saving due to a health contribution.	
	<p>BP stated that in relation to the £112,000 overspend on notional payment, these are now being paid at the start not end of term to create a small saving where possible. Savings in personal budget have been due to audits carried out by the SEN Finance Officer. GW asked about National Insurance increases, but BP indicated that final information was still awaited regarding this. AR confirmed this. RW indicated that there has been some funding received but this does not cover the full amount.</p> <p>GA confirmed that the growth in top ups had a fundamental impact on the budget, but queried what it was we were trying to achieve ? w To balance the budget or seek further funding via the safety valve programme or other Government SEN interventions. If no further funding it needs to be a change of mindset and expectations with parents. If we obliged to do this then we have no option then we need to accept otherwise we need to cut cloth and work with what we have.</p> <p>JC confirmed this is a national issue and Northumberland were ahead of the game in terms of forecasting and understanding position. Agreed are we getting the outcomes we need and we need to be SMARTer – is the funding meeting the provision in the plan? Need to relook at the EHCP's and the outcomes that come with that. Northumberland are in a better position than many other authorities across the country.</p> <p>DS stated the desire to spend the money appropriately is reflected in our practice to get the monies into school to make a difference. Impacted greatly by 125% more EHCP's in 5 years.</p> <p>Need to look at effectiveness and efficiency and best way to save is educate at most local school and while there are costs arising, this is better than alternatives.</p> <p>GW asked about safety value options.</p> <p>DS suggested the options were for increased scrutiny via the safety valve programme, following ESFA advice on how to decrease overspend, or seeking to do this independently .</p> <p>Some research, and references in the PAC January 2025 report, suggested little overall impact.</p> <p>GW asked if deficits were written off as part of the safety valve programme ? BP said this was not the case but the ESFA agreed a contribution as part of a move towards an overall balanced budget.</p> <p>BP suggested it should be considered as part of the overall Education funding system, not in isolation. When the final transfer from the Schools Block to the High Needs Block was being considered, if 1% had been taken, this would have been difficult for school budgets.</p> <p>GA expressed an appreciation that the lower 0.5% transfer has been agreed. A national solution was needed.for SEN. Schools should support inclusion, but needed a balanced approach.</p> <p>GA – it would not be good for central government to mandate and we are doing the right thing but could there be a national solution?</p> <p>SEMH impacts school behaviour and ADHD for extremes which is what impacts exclusion.</p> <p>DS agreed, in terms of meeting need and doing this as close to home as possible.</p>	

	<p>Could the top ups and funding be using these to plug other school funding gaps? GA responded they have not done this but there is a greater amount of higher needs to address which has increased their requests and spending on staffing to support this.</p> <p>JA agreed with Graeme Atkins, need to consider 66% increase i n students with SEMH at his school which is having a huge impact on funding and AP and specialist staff. This is 3 times the national average which is having a huge impact on schools as need to be able to finance this.</p> <p>BR indicated a need to be specific re SEND needs; SEMH needs to be explored as there remained opportunities for students to return to mainstream schools. He indicated 20-30% of children in special schools could move back to mainstream and how can we support them back. Parents were central to this.</p> <p>GW agreed that Jessica and David could work on this to get learners back to mainstream</p> <p>GA said it needed curriculum flexibility and creative thinking to allow those back into mainstream. Consequently inclusion increases, exclusions go down, attendance increases. As an authority we should look at schools and curriculum more creatively to address this.</p> <p>GW asked GA if they can provide a report on how they have addressed need and the actual impact this has had longer term. Need to consider the whole curriculum design, interventions and then standard curriculum</p> <p>JH said we need to consider the significant needs coming into early years and the impact this is going to have</p> <p>GW confirmed this reflected his experience in school.</p>	
7.	<p><b>SEN Public Accounts Committee Report January 2025</b></p> <p>BP highlighted some elements for consideration :</p> <ul style="list-style-type: none"><li>• SEN system is unaffordable and puts significant strain on local authorities.</li><li>• Forecast £4.6 billion deficit</li><li>• Best way to reduce transport costs is to educate a child in their local community</li><li>• 2.7% – 7.5% of children with plans across the country – we have 6.5% which is higher than national average.</li><li>• Need to share good practice across schools and areas.</li><li>• 98% of tribunals are lost by local authorities</li></ul> <p>It was important for the Government to set out what children with SEN should expect, what inclusive education means and how it could be met.</p> <p>DS said issue is code of practice dictates this already, identification may increase plans and support. He met regularly with other local authorities, and wondered whether a north east response could be taken.</p> <p>AM said we need to look at teacher training and give our teachers the confidence and skills. All should work within a special school to gain this.</p> <p>JC indicated working with health partners important to consider early identification and this was reflected in the parent carer forum and the impact this has on SEN and impact delays have on addressing needs.</p> <p>BP highlighted the reports finding for ICB's to consider SEN as part of wider priorities.</p> <p>Report recommendation was to have plan in place for financial solution by March 2026, should be published by March 2025 where possible.</p> <p>Northumberland have a very small proportion of plans that go to tribunal which is beneficial as cost implication of this. GA asked if we could look at the most 'successful' authorities to see if there are lessons we can learn from them.</p>	

8.	<p><b>SEN and EHCP data</b></p> <p>BP presented the latest data, 4104 EHCPs, 107 (2.6%) increase since mid November reported of 3997.</p> <p>Were supporting 853 Plans in mainstream in 2021 now there are 1445 in mainstream at Summer 2024</p> <p>GW highlighted PAC figure stating 41.6% getting plans within 20 weeks, compared to 60% currently. DS indicated projection for this year was 800 more plans and this is accurate so far.</p> <p>Turn down rate was about 7% and is now 27% so while increasing the agreements are far more robust and this is linked with significance of need.</p>	
9.	<p>DS reiterated that many things that are happening are very favourable and positive. Brilliant work is going on, tribunal figures are low and parents are happy. These represented Northumberland's successes</p> <p>JC noted that the offer in Northumberland is above anything she has seen in other authority areas. Joined up approach is very strong and focus on inclusion and not exclusion and knowledge of SEND is very strong. Great multi agency approach.</p>	
10.	<p><b>AOB</b></p> <p>GW thanked members for their attendance and participation and reminded all of the School Forum date of 19 February 2025.</p>	
	The meeting closed at 10.50 a.m.	



## Northumberland County Council SCHOOLS' FORUM

### Agenda Item 7

19 February 2025

### 2025 WORK PROGRAMME AND MEETING DATES

#### Schools Forum

**Wednesday 22 January 2025: 9.30-11.30 (Teams Meeting)**

Setting the DSG for 2025/26 – overall allocations  
De-delegation decisions for 2025/26

**Wednesday 19 February 2025: 9.30-11.30 (Teams Meeting)**

Setting the DSG budget for 2025/26 – individual budgets

**Wednesday 16 July 2025: 9.30-11.30 (Face to Face Meeting, Council Chamber, County Hall Morpeth)**

DSG Provisional Outturn  
Scheme for Financing Schools  
Analysis of School Balances

**Wednesday 01 October 2025: 9.30-11.30 (Teams Meeting)**

NFF Update  
Review of Schools Forum Membership

**Wednesday 26 November 2025: 9.30-11.30 (Teams Meeting)**

National Funding Formula Update & Consultation for 2026/27  
SEN Update

**High Needs Committee (Provisional):**

**Wednesday 03 February 2025, 9.30 -11.00**

**Wednesday 02 July 2025, 9.30 -11.00**

**Wednesday 12 November 2025, 9.30 -11.00**

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