



CUMBERLAND SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON

16 January 2025

**Cabinet Meeting Room, Cumbria House, Carlisle
(and Microsoft Teams)**

PRESENT

James Blackwell (Maintained Primary Schools)
Andy Curtis (Teachers' Professional Associations – NASUWT)
Danny Gee (PRUs)
David Grimshaw (Maintained Primary Schools)
Vicki Jackson (Secondary Academy)
Elaine Lynch (Cumberland Portfolio Holder – Lifelong Learning & Development)
Chris McAree (Secondary Academy)
Michael Smillie (Secondary Academy)

Officers in Attendance:

Emma Hamer	(AD – Education and Skills)
Claire Marshall	(Group Accountant – Children's Social Care & Education)
Amanda Chew	(Finance Manager)
Sophie Scott	(Finance)
Pat Harvey	(Finance)
Nicola Shiels	(Forum Support)

Observers:

None

Apologies for Absence

Tom Hailwood	(Maintained Secondary)
Rhiannon Hughes	(Maintained Nursery)
Simon Jackson	(Secondary Academy)
Sue Lowndes	(Interim Senior Manager – Learning Improvement Service)
Nerissa Nicholas	(Maintained Primary)
Sally Senejko	(Senior Manager – SEND, Education & Inclusion)
Kris Williams	(Special Academy)

PART 1: ITEMS LIKELY TO BE CONSIDERED IN THE PRESENCE OF THE PRESS AND PUBLIC

There was some concern at the low level of attendance at the meeting. The importance of the Schools Forum and the powers and responsibilities was emphasised. Schools Forum meetings needed to be prioritised and, apart from in exceptional circumstances, all members of the Forum must attend future meetings. This would be raised with all relevant groups to ensure that appropriate representation was secured.

1. Exclusion of Press and Public

It was agreed that all items would be considered in the public domain.

2. Declarations of Interest

There were no declarations of interest at this stage.

3. Minutes of Previous Meeting and Matters Arising

The minutes of the meeting held on 5 November 2024 were agreed as an accurate record.

It was noted that a date for training for all members of Schools Forum still needed to be identified.

There were no other matters arising.

4. High Needs Working Group – Notes and Actions

The first meeting of the re-convened High Needs Working Group was held on 12 November 2024. The initial meeting of the group had been welcomed and the notes of the meeting were received.

5. Dedicated Schools Grant – School Budgets 2025-26

A report that informed Schools Forum that the 2025-26 Dedicated Schools Grant (DSG) Schools Block allocation for Cumberland was £225.823m which represented an increase of £14.2776m compared to 2024-25.

Schools Forum were asked to approve the growth fund budget at £0.288m in 2025-26 to support schools experiencing a growth in pupil numbers in their own catchment areas above their Published Admission Numbers (PAN).

After calculating the school budget shares using the national funding formula and after considering the proposed growth fund budget there was a shortfall on the funding formula of £1.244m therefore resulting in a necessary reduction of AWPU and therefore there will be no transfer to the High Needs Block to support budget pressures.

The report also asked the maintained schools forum representatives to approve the de-delegated budgets for 2025-26 and the primary and secondary per pupil rates.

On 5 November 2024, following the outcome of the consultation with all maintained schools and academies, Schools Forum agreed to recommend to Executive that Cumberland should adopt the National Funding Formula (NFF) in 2025-26 and that any

shortfall in school block funding would be managed by reducing the basic per pupil funding factor values in the formula (if applicable). Any surplus balance remaining in the Schools Block, after considering the growth fund budget, up to a maximum of 0.5% should be transferred to the High Needs Block. Executive approved this recommendation on 16 December 2024.

The Schools Block funding had increased compared to 2024-25. The Core NFF had increased by £14.789m but this included some grants that were funded outside of the DSG in 2024-25 but had now been 'rolled into' the DSG while being offset by pupil number reductions.

A minor census issue had been identified by the local authority of 9 pupils missing from a primary school the October 2024 census. This had been raised with the DfE and the relevant adjustments had been made through the APT. Schools were reminded of the importance of submitting their census data accurately due to the impact on the funding formula if pupils were omitted.

The premises factor at LA level, had increased based on estimated National Non-Domestic Rates (NNDR) costs in 2025-26 for each maintained school and academy in Cumberland plus any rates adjustments for 2024-25 (either positive or negative) and exceptional rents costs for 2024-25.

The growth fund factor at LA level had decreased by £0.987m compared to 2024-25 relating to a reduction in pupils in the middle layer super output area (MSOA), and was not offset by an increase in the falling rolls factor as the reduction did not meet the 10% threshold. The growth fund factor was not ring-fenced and could be used to support the school funding formula, if required.

Local authorities were permitted, with the agreement of their Schools Forum, to retain a growth fund to support mainstream maintained schools and academies in its area in meeting increased local pre-16 demand for school places resulting from 'natural' demographic changes or nearby housing developments within a school's own catchment area.

As in previous years, the budget required for the growth fund was deducted from the Schools Block before calculating the school budget shares. In 2024-25 the growth fund budget was £0.362m; as at 30 September 2024 the spend forecast for 2024-25 was £0.224m showing an underspend of £0.138m which would transfer to DSG reserves.

Work was ongoing to identify potential growth funding requirements for 2025-26 however approval was sought from Schools Forum for the growth fund budget to £0.288m, a reduction from 2024-25 of £0.074m to fund ongoing and new growth in schools that were admitting pupils over PAN at the LA's request to meet basic need. It was expected that growth funding of £0.188m would be needed for approximately 60 secondary places and £0.100m for approximately 45 primary places. As in previous years, any under or overspend against the Growth Fund budget will transfer to the DSG reserves.

The Cumberland growth fund criteria for allocating funding to mainstream maintained schools and academies was approved at Schools' Forum in January 2024. From 2024-25 local authorities must follow the ESFA's new local formula requirements for growth funding, whereby additional classes (driven by basic need) must be funded by at least the minimum funding level of £1570 for both primary and secondary. As the values in

Cumberland were in excess of the £1570 minimum, it was not proposed to make any changes to the growth fund criteria.

Local authorities were also permitted to have a discretionary falling rolls fund. It was not proposed to have a falling rolls fund in 2025-26 as Cumberland and formerly Cumbria had not had a falling rolls fund in previous years as the expectation was that falling rolls were foreseen and planned for by schools and academies by adjusting staffing levels accordingly.

After calculating the School Budget Shares through the APT and applying the National Funding Formula (NFF) in full, the formula for 2025-26 was unaffordable with a shortfall on the Formula of £1.244m. This shortfall was due to a reduction in pupil numbers impacting on the growth fund factor and an increase in Free School Meals (FSM) eligibility and other pupil characteristic changes.

As agreed by Schools Forum in November 2024, and approved by Cumberland Council Executive, school AWPU rates had been reduced to make the formula affordable for 2025-26 within the financial funding envelope. School AWPU rates were still above the NFF minimum funding threshold. After calculation school budget shares and having considered the proposed growth fund budget there was no balance remaining to transfer to the High Needs Block in 2025-26.

The report also detailed the maintained schools de-delegated budgets for 2025-26, and the primary and secondary per pupil rates that would be used in Cumberland.

The school budget shares calculated by the local authority were due to be submitted to the ESFA by 22 January 2025 and would be subject to validation and approval by the ESFA before final school budget shares could be confirmed. The deadline set by the DfE for mainstream maintained schools to be notified of their budget by the LA was 28 February 2025. Academies would be informed of their budgets by the ESFA by 31 March 2025.

In discussing the report an update was given in relation to the school organisation plan which was now in place. This holistic piece of work would provide a strategic perspective that could be used to determine financial impacts and implications.

There was a short discussion about the potential impact of auto enrolment for FSM, and it was acknowledged that this may have an impact in future years. Work was ongoing within the F40 Group, that Cumberland was now part of, and it was important to continue lobbying to change pupil count and the use of more accurate FSM data in future.

Forum expressed some concern regarding the pupil number error on October census that had been highlighted in the report, particularly the impact on all schools. Schools had been reminded that they must submit accurate data but there was also a need to strengthen links between data teams, data and performance oversight. Related to this there would be strengthened accountability, support and challenge with a cultural change needed to move everyone forward from previous practices.

Prior to the decision regarding maintained schools de-delegated budgets, and in response to a question, LA officers confirmed that they were ensuring best value for the de-delegated spend areas.

Schools Forum approved:

- i) a growth fund budget of £0.288m; and
- ii) the growth fund allocation criteria at Appendix 2 of the report.

Maintained school representatives approved the maintained schools De-delegated budgets for 2025-26, as set out in the report.

6. Dedicated Schools Grant – Other Budgets 2025-26

A report that informed Schools Forum of the 2025-26 Dedicated Schools Grant (DSG) for Central School Services, Early Years and the High Needs Blocks was presented.

The Education and Skills Funding Agency (ESFA) published the DSG allocations for 2025-26 on 18 December 2024. The DSG was allocated in 4 blocks: Schools Block, High Needs Block, Early Years Block, and Central Schools Services Block. The total allocation across these 4 blocks for Cumberland was £310.644m.

The Schools Forum members were asked to note DSG Central School Services, Early Years and High Needs Block allocations for 2025-26. The Schools Forum was also asked to approve the proposed 2025-26 centrally retained expenditure budgets for the Central School Services and Early Years Blocks for Cumberland.

Central Schools Services Block – This was made up of two elements, historic commitments and ongoing commitments and had increased by £0.042m. Since 2020-21, DfE had committed to reduce the historic commitments element by 20% each year. Most of the historic commitments related to contributions towards Council school-related children's services staffing, health and safety and people management budgets in addition to prudential borrowing.

The proposed CSSB budgets for 2025-26 were set out in the report. The annual charge for copyright licences, was set by the ESFA and re-charged to local authorities.

The previous grant, Core Schools Budget Grant (CSBG) and Teachers Pension Employer Contribution Grant (TPECG) for Centrally Employed Teachers that was paid outside of the DSG in 2024-25 had been rolled into the Central School Services Block for 2025-26.

Early Years Block – The Early Years Block allocation had increased by £11.893m. Most of the increase in the EYB was to fund the Under 2s and eligible working parents of 2 year olds entitlements. The EYB allocation was provisional and would be adjusted in July 2025 and July 2026 to reflect the actual hourly take up of disadvantaged 2 year olds and 3-4 year old provision free entitlement.

The increases in under 2s, 2 year old and 3-4 year old funding also represented an increase in the LA level hourly funding rates which reflected the roll in of the early years supplement grant which was a separate grant in 2023-24. These adjustments would be based on January 2025 and January 2026 census data and the new entitlements for 2 years and under 2's would continue to be adjusted on a termly basis in 2025-26.

The local authority should announce the funding rates to childcare providers by 28 February 2025. This would become a legal requirement by 2026-27.

The report also detailed the early years pupil premium, the disability access fund and maintained nursery schools supplementary funding as well as setting out how the early years block was made up.

In line with the Schools Forum regulations, the Schools Forum must approve the proposed centrally retained early years expenditure budgets of £0.417m for Cumberland in 2025-26. It was also proposed that the full increase in the under 2s, 2 year olds and 3-4-year-old LA level hourly funding rate would be passed onto Early Years Providers in 2025-26.

High Needs Block – The High Needs Block allocation, before deduction for directly funded places by the ESFA, was £43.037m and had increased by £3.276m compared to 2024-25.

Local authorities' allocations for the High Needs Block funding formula included a funding floor protection of at least 7% per head of 2-18 year old population capped at a maximum of 10%.

The minimum funding guarantee (MFG) for Special Schools must be set at a minimum of 0% against the 2024-25 baseline.

As with mainstream schools, the maintained special school and PRU budget shares would be published on 28 February 2025. The High Needs Block allocation was provisional and was subject to later adjustments including ESFA direct funded places in academies and further education colleges.

The importance of having all sectors, including early years, represented on Schools Forum was emphasised. There was also a request that the High Needs Working Sub-Group consider the development of plans and strategies including SEND and HNB management plans.

SEND funding was a national issue and there were concerns about inclusivity were across piece. Reforms were expected but specific announcements from DfE were awaited. In anticipation of reforms, it was important to be proactive and ensure that we are developing practice ahead of potential changes coming online.

Schools Forum approved:

- i) the provisional Central School Services Block budget of £1.835m; and
- ii) the provisional centrally retained Early Years expenditure budget of £0.417m.

7. Schools Payroll Contract

A report was presented that informed Schools Forum that a new framework for payroll and HR Admin services for maintained non-cheque book schools would be procured during 2025. There was a requirement to consult Schools Forum members on the terms of the contract.

A framework for the provision of payroll and HR Admin services to maintained non-cheque book schools had been in place since June 2020. The framework contract would end on 31 March 2024 with individual school call offs against the contract ending on 31 August 2025. A new framework contract needed to be procured to ensure schools had payroll contracts in place from 1 September 2025.

Where the local authority was entering into a contract to be funded from the schools budget, there was a requirement to consult with the Schools Forum. The consultation must cover the terms of the contract at least one month prior to the issue of invitations to tender and was expected to launch in late January 2025. The invitation to tender was expected to be issued in Spring 2025.

Schools Forum members would be notified when the consultation was due to commence so they had an opportunity to review and comment on the contract documentation.

It was noted that a number of services were currently outsourced but, looking further ahead, there may be opportunities to deliver services slightly differently. It was important to procure a quality service that provided value for money that schools would want to use.

Schools Forum noted the report.

8. Cumberland Schools Forum

At the meeting held on 5 November 2024 it had been agreed that documents relation to the working of the Schools Forum should be shared ahead of the January 2025 meeting.

The Cumberland Schools Forum Constitution, as agreed by Cumberland Shadow Executive on 16 February 2023 and Cumberland Shadow Schools Forum on 22 March 2023, Schools Forum Operational and Good Practice Guidance and the Schools Forum Powers and Responsibilities document had been circulated with the agenda.

Given that the current constitution had been agreed prior to LGR and the formation of two new councils, each with its own Schools Forum, it was proposed that the Chair and Vice-Chair meet with LA colleagues, including the AD Education, SEND & Inclusion to review the constitution. The review would cover membership, terms of office, consultation with constituents, nomination of members as well as anything else relevant.

It was further suggested that a short form should be developed that Schools Forum members would be asked to sign to confirm that they had read and understood documents including the Schools Forum Operational and Good Practice Guidance and Schools Forum Powers and Responsibilities.

9. Date of Next Meeting

The next meeting of the Schools Forum would be held on Tuesday, 18 March 2025. This would be an in-person meeting, beginning at 9.30am and it would be held in the Cabinet Meeting Room, Cumbria House, Carlisle.

10. Any Other Business

There were no other items of business.