

CUMBERLAND SCHOOLS FORUM
MINUTES OF THE EXCEPTIONAL MEETING HELD ON
20 October 2025
(Microsoft Teams)

PRESENT

Nicky Corfield	(Maintained Primary Schools)
Andy Curtis	(Teachers' Associations)
Danny Gee	(PRUs)
David Grimshaw	(Maintained Primary Schools)
Rhiannon Hughes	(Maintained Nursery Schools)
Terentius Jackson	(Maintained Primary Schools)
Vicki Jackson	(Secondary Academy)
Ruth Lawler	(Secondary Academy)
Joanne Lloyd	(Maintained Primary Schools)
Chris McAree	(Secondary Academy)
Kris Williams	(Special Academy)

Officers in Attendance:

Sue Lowndes	(Interim Service Manager – Learning Improvement Service)
Paula Gledhill	(Interim Group Accountant)
Sophie Scott	(Finance Manager – Education, SEND & Inclusion)
Nicola Shiels	(Forum Support)

Observers:

None

Apologies for Absence

Natalie Bevan	(SEND & AP Lead and Transformation Manager)
James Blackwell	(Maintained Primary Schools)
Sarah Flockton	(Senior Manager – Strategic Development)
Emma Hamer	(AD – Education, SEND & Inclusion)
Elaine Lynch	(Cumberland Portfolio – Lifelong Learning & Development)
Joanne Ormond	(Maintained Primary Schools)
Declan McArdle	(Maintained Secondary)
Sally Senejko	(Senior Manager – SEND & Inclusion)
Michael Smillie	(Secondary Academy)
Dawn Watson	(Primary Academy)

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

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. School Funding Formula 2026-27

In July of each year the details of the dedicated schools grant (DSG) funding for the next financial year were usually announced. However, the indicative allocations for 2026-27 had not yet been published and there was no indication of when these would be published. However, the Schools Block Operational Guide which was usually published alongside the indicative allocations had been published in part meaning policy changes around the DSG were, to a degree, known. Cash values would follow.

In previous years, Cumberland's school funding formula had mirrored the NFF in full but if there was a shortfall in Schools Block funding after allocating funding on this basis, and after taking into account the Growth Fund budget, a shortfall would be managed by reducing the basic per pupil funding factor in the formula up to a maximum of -2.5% or the allowable value in line with DfE guidance when it was published.

Similarly, if a balance remained within the Schools Block after applying the NFF in full and after taking into account the Growth Fund budget, up to 0.5% was transferred to the High Needs Block to support the ongoing budget pressures. Thereafter, any residual balance remaining had been allocated to schools through the school funding formula by increasing the basic per pupil funding factor.

It was not possible to confirm the actual value of any potential transfer to the HN Block, if any, until the DfE published the final data set to be used to calculate the school budget shares in December 2025. This would take into account the October 2025 census pupil data and characteristics.

An alternative option would be to not transfer any funding to the High Needs Block and allocate any surplus budget, after taking into account the Growth Fund budget, to schools through increasing the basis per pupil unit factor values. This would need to be within the +2.5% factor value threshold range. However, this option was not recommended as there was a risk that, due to the proposal requiring local authorities to move their local formula closer to the NFF, 'topping up' the NFF factor values by allocating additional funding through the formula would create greater turbulence for some schools in future. It may also make applying the NFF in full unaffordable in future years as the additional funding would be built into the school budget share baselines, but the funding for this was not reflected in the notional school budgets used by the DfE to calculate local authority level core NFF funding.

A shortfall or balance remaining in the Schools Block after allocating the funding using the NFF could arise due to the way in which local authorities were funded. The actual primary and secondary units of funding at local authority level were based on October 2024 pupil data. Changes in pupil characteristics, such as eligibility for FSM or changes in attainment levels, were not reflected in the primary and secondary units of funding used to allocate

the core NFF funding to local authorities in 2026-27. Only changes in pupil numbers were taken into account.

The Growth and Falling Rolls factor within the Schools Block was not ring-fenced and local authorities could decide on the level of growth/falling rolls budgets needed locally in consultation with Schools Forum. This funding could be also used to fund the school funding formula if required. This could also impact on whether there was a shortfall or balance remaining to transfer to the High Needs Block.

Any change to basic per pupil funding, either to increase or decrease it, would not affect every school as some would be protected through the Minimum Per Pupil Funding Levels (MPL) and Minimum Funding Guarantee (MFG) factors.

LAs were required to consult schools on whether to adopt the NFF in full and the outcome of the consultation would be presented to Schools Forum to make a recommendation to Executive who were the statutory decision maker on the Schools Funding Formula. Due to the lead in timescale for the Executive, the time needed to consult schools and report to Schools Forum, it was proposed that a consultation be undertaken on the principles of applying the NFF in full and the treatment of a shortfall or surplus in the formula, but that no modelling of potential budget shares was included as the data was unavailable.

A draft consultation document was included with the report that set out three recommended questions to ask schools:

- i) Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to schools in 2026/27?
- ii) Do you agree that, if there is a shortfall in Schools Block funding after applying the National Funding Formula in full that this is managed by reducing the basic per pupil funding factor?
- iii) Do you agree that, if there is any Schools Block funding remaining (up to a maximum of 0.5%) after allocating the school funding formula to schools using the NFF, it should be transferred to the High Needs Block?

Question 1 must be included in the consultation, but Schools Forum could recommend alternative questions to include.

If Schools Forum supported the proposal, the consultation document would be finalised and launched on 21 October for a period of 2 weeks. This would allow time both before and half-term for colleagues to submit a response. A further report would be presented to Schools Forum on 5 November to share the outcomes from the consultation; the Executive meeting on 25 November would make the final decision on the school funding formula for 2026-27.

A national funding formula had been introduced for schools from 2018-19 and since then local authorities had been able to decide, in consultation with schools and the Schools Forum whether to use the NFF to allocate funding to schools. Alternatively, there remained the option to apply a locally determined schools funding formula, within some restrictive parameters. In 2023-24 the DfE began the first year of transition towards a direct NFF, whereby all schools (including academies) would be funded using a single NFF and in doing so placed further restrictions on local flexibility.

In 2025-26, on the recommendation of Schools Forum, the Executive decided, as in previous years, that NFF would be used to allocate funding to schools and academies in Cumberland. When the final DSG Schools Block allocation for Cumberland was published

by the ESFA in December 2024, after applying the NFF in full and taking into account the Growth Fund budget of £0.288m, there was a shortfall of £1.244m which the AWPU had to be reduced to account for.

In discussing the report and the draft consultation paper, it was noted that the growth fund was used to allocate funding to schools that had admitted additional pupils over the published admission number at the request of the LA to meet demand for places in the local area. At this stage, the level of the growth fund for 2026-27 was not known. The level would be calculated based on pupil numbers/factors which were not yet available.

Given that there were no indicative figures and no modelling to share with the consultation paper, there was a view that there may be a lower level of responses from schools. Forum members had a better understanding of the process having considered and discussed the funding formula and proposed consultation document, but it was suggested that a briefing paper should be sent to headteachers that included an explanation about why the modelling could not be provided.

The intention was to include a narrative to the consultation paper together with a link to the consultation as well as a statement to headteachers that if they had any queries or wished to discuss anything further, they should contact the School Finance Team or their School Forum representative.

Officers also explained that if LA wanted to transfer more than 0.5% from the Schools Block to the HNB, then a disapplication request would need to be submitted to DfE for approval.

In terms of timescales, because DfE had given no indication as to when the details of school funding levels for 2026-27 would be available, it was not possible to wait to allow for the indicative allocations to be available. There were a number of steps that had to be taken and deadlines to meet including consulting with schools, reporting to DMT and the Council Executive in order that an appropriate decision could be taken, completion of the Authority Proforma Tool (usually by end January) and publishing school budget shares by 28 February 2026. In 2024, allocations had not been published until 20 December, so it was important to proceed in order to fit the required timescales and meet deadlines.

It was noted that previously, as well as the options set out in the consultation, an additional option was included that should there be a surplus, rather than transfer up to 0.5% from the Schools Block to the HNB, this could be allocated to schools via the AWPU. Schools Forum had discussed the inclusion of this option and had agreed that it should no longer be included due to the reasons of potential turbulence in school budgets from year to year.

There had not been a transfer from the Schools Block to the HNB in 2024-25 but there had been in 2023-24 (figure not available but would be provided). Forum members were reminded that the statutory override was expected to end in March 2027 and at that point, any deficit on the HND and in DSG reserves would transfer to the council balance sheet. There were unlikely to be sufficient reserves to account for this so the council may have to consider issuing a S114 notice.

The Chair asked Forum to consider including an additional option in the consultation, that:

- Should there be a balance remaining within the Schools Block after applying the NFF in full, this should not be transferred to the High Needs Block but any surplus budget be allocated, after taking into account the Growth Fund budget, to schools through increasing the basis per pupil unit factor values with the caveat that this may cause fluctuations in funding in subsequent years.

This was put to the vote with 8 members voting to keep the consultation paper as it had been presented, i.e. without the additional option and 2 members voting to include the additional option.

As a result of the above vote, the consultation document would be circulated as presented to Schools Forum and the Forum:

- noted that the provisional DSG allocations for 2026-27 had not yet been published and the impact of this;
- supported the recommendation to consult all schools on the proposal to apply the National Funding Formula in full in 2026-27;
- supported the recommendations to
 - a) reduce the basic per pupil funding factor values in the formula if there was a shortfall, after applying the National Funding Formula in full and taking into account the Growth Fund budget;
 - b) transfer any remaining balance up to 0.5% to the HN Block and allocate any leftover balance thereafter, to schools by increasing basic per pupil funding factor values in the formula; and
- supported the draft consultation document at Appendix 1 which included three recommended questions.

4. Date of Next Meeting

The next meeting of the Schools Forum would be held on Wednesday, 5 November 2025. It was noted that the meeting would start later on this occasion, at 11.00am. This would be an in-person meeting, held in the Cabinet Meeting Room at Cumbria House in Carlisle.

5. Any Other Business

There were no other items of business.

NS/ES&I

October 2025