



CUMBERLAND SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON

21 March 2024

via Microsoft Teams

PRESENT

James Blackwell (Maintained Primary)

Andy Curtis (Teachers' Professional Associations – NASUWT)

Elaine Lynch (Cumberland Portfolio Holder – Lifelong Learning & Development)

Chris McAree (Secondary Academy)

Michael Smillie (Secondary Academy)

Kris Williams (Special Academy)

Officers in Attendance:

Emma Hamer (AD – Education and Skills)

Susan Milburn (Group Accountant – Education & Inclusion)

Claire Marshall (Group Accountant – Children's Social care & Education)

Amanda Chew (Finance Manager)

Sophie Scott (Finance)

Sally Senejko (Senior Manager – SEND, Education & Inclusion)

Lynsey Armstrong (Representing Lesley Nixon, Senior Manager – Learning Improvement Service)

Nicola Shiels (Forum Support)

Observers:

None

Apologies for Absence

Rhiannon Hughes (Maintained Nursery)

Lesley Nixon (Senior Manager – Learning Improvement Service)

Nerissa Nicholas (Maintained Primary)

Tom Hailwood (Maintained Secondary)

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

Emma Hamer, the new AD for SEND, Education & Inclusion was introduced.

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 meetings of the Schools Forum held on 15 January 2024 were agreed as an accurate record.

4. Early Year's Budget 2024-25

A report was presented that set out the decision on the Early Years Budget 2024-25 as agreed by the Executive on 13 February 2024.

The decision was in line with the recommendation made at the meeting of Cumberland Schools Forum on 15 January 2024 following consultation with schools and academies:

- Centrally retained budget of £0.072m;
- Allocation of the new 2-year old and under 2s funding by using a base rate of £7.12 per hour for 2-year olds and £9.77 for under 2s; and
- Deprivation supplement of £0.21 per hour for 2-year olds and under 2s based on children living in IDACI bands A-F.

The maintained schools' representatives on the Schools Forum noted the decision that had been taken by the Executive on 13 February.

5. De-delegated Contingency Budget Monitoring Q3 2023-24

A report presenting the forecast outturn position on the de-delegated contingency budget for the 2023-24 financial year as at 31 December was presented. The budget was forecast to underspend by £0.336m and in accordance with the Dedicated Schools Grant conditions, the underspend would be carried forward into the Dedicated Schools Grant earmarked reserve.

As this was a de-delegated budget it therefore only related to maintained schools and not to academies.

The de-delegated contingency budget for 2023-24 was £0.379m. DfE guidance stated that the contingency budget could be used for three purposes:

- Circumstances which were unforeseen when the school's budget share was initially determined
- Schools in financial difficulties
- Additional costs relating to new, reorganised or closing schools

Circumstances which were unforeseen when the school's budget share was initially determined.

The main areas of expenditure related to ill health retirements, settlement agreements and other staff termination costs in schools in line with the agreed policy, administration costs relating to the administration of the Teachers Annual Return and temporary accommodation costs at the Gillford Centre PRU.

During a short discussion, there was a question about intelligence held by the LA in respect of schools that could potentially fall into an Ofsted category at the next inspection and of those schools with a deficit budget, which might be at risk? Colleagues explained that Finance and Learning Improvement have regular meetings to look in detail at those schools that might be impacted but Schools Forum also requested that a list of the schools and the potential risk be available for the next full meeting on 11 June 2024.

The Schools Forum noted the forecast outturn position as at Q3 for the contingencies budget 2023-24.

6. High Needs Budget Monitoring Q2 2023-24

A report was presented that provided an update on the High Needs (HN) block deficit as at 31 December 2023 which was forecast to increase compared to the forecast position at Q2.

A balanced High Needs budget had been set for 2023-24 with no planned transfer to or from reserves. The initial budget available for the HN Block was £35.881m based on the provisional HN block allocation from central government as confirmed in December 2022 with no transfers from the Schools Block. Since the initial budget was set the HN block allocation had been updated to reflect adjusted recoupment for HN places.

Performance against the High Needs Block budget was monitored monthly with reports presented to senior management, and to Executive on a quarterly basis, as well as to each Schools Forum meeting. The projection against the budget as at Q3 showed that the budget was projected to overspend by £3.480m as at 31 March 2024.

The key variances related to special schools, the cost of independent specialist and other placements, residential placements, post-16 ISPs and top-ups, post 16 further education (FE) colleges, invest to save initiatives, EHCP top-ups in mainstream and early years providers, PRUs and individual non-material variances.

The pressure against the High Needs Block continued to be due to specific budget pressures relating to the growth in demand for Education Health Care Plans (EHCPs) for children and young people with SEN. The number of children with an EHCP as at Q3 was 2709; this figure was provisional pending the completion of the disaggregation of cases between the two new councils. Benchmarking showed Cumberland's percentage of pupils with EHCPs was higher compared to the national rate and to Cumbria's statistical neighbours. The rate of increase for Cumbria overall was matched by the rate of increase nationally and compared to Cumbria statistical neighbours.

In 2023-24 local authorities had seen an increase in their High Needs Block funding of at least 5% per head of population and additional High Needs funding to reflect likely cost increases for local authorities and schools of £1.585m resulting in total funding of £35.580m as at Q3. 29% of the total allocation was still based on historic 2017-18 actual

spend and there had been no transfer of funding from the Schools Block to High Needs Block in 2023-24.

Cumbria were part of the Department for Education's Delivering Better Value for SEND programme and successfully applied and received approval for a £1m grant for each new authority to support their improvement plans the impact of which would be incorporated into Cumberland's DSG management plan.

There followed a brief discussion that covered the following points:

- Was it possible to review working arrangements with FE sector to enable data to be received more quickly to reduce the variants between Q2 and Q3? Should variants at Q3?
- It was suggested that the High Needs working group should be reconstituted to allow more detailed monitoring and scrutiny of the high needs budget and to consider the longer-term perspective and planning for the future.
- To also consider the shorter term, problems keeping pace with cost of workforce, non-teaching staff pay award, etc and the ability to feed in concerns and wider contributions at a national level.

It was agreed that the High Needs working group should be reconstituted and a meeting would be arranged in due course.

It was also noted that there was more work to do relating to sufficiency across the Cumberland estate as well as more specifically related to SEND – alternative provision, resourced provision and having more specialist places available locally. Work was ongoing to consolidate plans and officers were looking to develop a more collective approach with headteachers and schools.

Cumberland Schools Forum noted the current projection on the HN Budget as at 31 December 2023.

7. Date of Next Meeting

The next meeting of the Schools Forum would be held on 11 June 2024, starting at 9.30am. It was likely to be held via Microsoft Teams; final arrangements would be circulated prior to the meeting.

8. Any Other Business

There were no other items of business.

NS/E&S
April 2024