CUMBERLAND SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON
18 March 2026
Council Chamber, Allerdale House, Workington
(and Microsoft Teams)

PRESENT

James Blackwell	(Maintained Primary Schools)
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)
Ruth Lawler	(Secondary Academy)
Joanne Lloyd	(Maintained Primary Schools)
Elaine Lynch	(Cumberland Portfolio – Lifelong Learning & Development)
Chris McAree	(Secondary Academy)
Sophie McCabe	(Maintained Special Schools)
Joanne Ormond	(Maintained Primary Schools)

Officers in Attendance:

Emma Hamer	(Assistant Director – Education, SEND & Inclusion)
Sarah Flockton	(Senior Manager – Strategic Development)
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)
Vicki Jackson	(Secondary Academy)
Declan McArdle	(Maintained Secondary)
Michael Smillie	(Secondary Academy)
Kris Williams	(Special 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

Ahead of the meeting Joanne Lloyd, representing maintained primary school had indicated that her husband was Chair of Governors at a Cumberland secondary school.

There were no further declarations of interest at this stage.

3. Minutes of Previous Meeting and Matters Arising

The minutes of the meeting held on 14 January 2026 were agreed as an accurate record.

There was one matter arising from a decision take previously by Forum, relating to consideration of the RPA option for schools. This would be raised under any other business.

There were no matters arising.

4. High Needs Working Group – Notes & Actions

The notes of the meeting of the Schools Forum High Needs Working Group held on 24 February were presented. At the meeting, the group had considered:

- Cumberland Inclusive Provision Panel;
- Post 16 FE Sufficiency; and
- 'Real-time' High Needs Block Budget Position

Updated data relating to EHE, special school capacity, ISPs, EOTAS and placement data was also provided after the meeting for inclusion in the notes.

The Inclusive Provision Panel (IPP) would be a school led panel, designed to strengthen practice in schools. It was important to note that it would not simply be a funding panel, but would be an advice-led panel, providing support and advice to schools that were finding it difficult to meet a child or young person's needs. The intention was to support schools to do more earlier and to use existing expertise.

The panel would have four core roles:

- Peer advice and challenge
- Promoting inclusive practice
- Supporting appropriate use of resources
- System learning and assurance

This work was aligned to Ofsted and CQC expectations and it supported the wider ambition to build capacity in mainstream provision. The IPP was about supporting schools, improving outcomes for children and young people, and ensuring the long-term sustainability of the High Needs Block.

Post 16 representation on Forum was raised. It was noted that previous efforts to secure representation had been unsuccessful; current representatives committed to assist in securing an appropriate Post 16 representative to join Forum.

There was some concern about exclusions; it was stressed that this could be a difficult issue for many parents and work across the system, and with schools, was needed in relation to attendance and exclusions.

In relation to proposed SEND reforms, the teaching association representative shared that there were some concerns nationally around the proposals. It was noted that this was an evolving picture with information and updates being received on a regular basis and the consultation on SEND reform, putting children and young people first, remained open with a closing date of 18 May.

Schools Forum noted the draft notes of the High Needs Working Group held on 24 February 2026.

5. DRAFT De-Delegated Contingency Budget Monitoring Q3 2025-26

A report setting out the draft forecast outturn position on the de-delegated contingency budget for the 2025-26 financial year as at 31 December 2025 was presented. It was noted that the position was draft as it was still to go through the full governance process due to timelines of meetings. The budget was forecast to underspend by £0.215m and in accordance with the Dedicated Schools Grant conditions, the underspend would be transferred back to the DSG reserve at year end.

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

The de-delegated contingency budget for 2025-26 was £0.378m. 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 difficulty
- Additional costs relating to new, reorganised or closing schools

Circumstances which were unforeseen when the school's budget share was initially determined.
The main area of expenditure related to the temporary accommodation costs at the Gillford Centre PRU and the estimated cost for the removal of these buildings. The temporary buildings were removed from the school site during the 2025 summer holidays; therefore these costs would cease in the longer term.

As a result of challenge by Schools Forum, Teacher Pension Returns Costs and the appropriateness of this coming from the contingency fund budget had been reviewed and these costs had also ceased. The amount reflected in the report was for the initial contract up to and including 31 August 2025; further costs in relation to this spend would, in future, be covered by other council budgets rather than the school contingency fund.

During the 2025-26 financial year, one school had converted to an academy on 1 March 2026 with a further two schools to also academise during 2026-27. The deficit shown in the forecast was 50% of the deficit agreed to be paid at conversion. The remaining 50% was due to be picked up corporately by the Local Authority. The schools finance team would continue to challenge spend by the three academising schools to ensure it remained reasonable between now and the date of conversion.

At the meeting on 14 January 2026, Schools Forum had agreed that £30,000 of this underspend would be delegated back to the Local Authority to assist with challenge, support and training for deficit schools. As a result, this forecast had changed to an underspend of £0.215m since the Q2 position. It was expected this £30,000 would be fully spent with the LA providing a full breakdown of all spend in the next monitoring report.

There was a discussion about the use of the £30k detailed above and whether, given the removal of delegation, it had been sufficient in terms of additional support to schools. The funding had contributed to:

- additional support from the Learning Improvement service in terms of enhanced support regarding curriculum, SEND pressures and structures
- supporting the removal of delegation by being able to engage strategic support for the school
- additional support and challenge to schools
- contributing to the cost of DfE training for schools that would take place at the end of March

The funding had not fully covered the additional support outlined but had offset some of the pressures and was considered as an invest to save, however it was important to find the correct balance for allocating funding from the contingency budget in future years while maintaining an appropriate level in the event of it being required for any of the three purposes set out above.

Thanks were expressed to the School Finance Team for their continuing hard work, and it was noted that to future-proof this activity, the level of allocation may need to be reviewed each year.

Schools Forum would maintain an overview through the quarterly monitoring reports and would consider whether a further allocation was appropriate, and at what level, when expenditure against the 2026-27 de-delegated contingency budget was clearer and Forum was in a position to do so.

Cumberland Schools Forum noted the forecast outturn position as at Q3 for the contingency budget 2025-26.

6. <u>DRAFT High Needs Budget Monitoring Q3 2025-26</u>

A report setting out the draft High Needs (HN) deficit position as at 31 December 2025 was considered. As with the previous report, it was noted that the position was draft as it was still to be signed off by the Executive. The High Needs (HN) block deficit was forecast to be £33.685m as at 31 March 2026.

A balanced High Needs budget had been set for 2025-26 with no planned transfer to or from reserves. The initial budget available for the HN Block was £39.556m based on the provisional HN block allocation from central government as confirmed in December 2024. There were 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 £8.147m, in year, as at 31 March 2026.

The key variances were detailed in the report and related to special schools, resourced provision, ISP and other placements, central SEN, residential ISPs, invest to save initiatives, post-16 ISPs, post-16 FE colleges, EHCP top-ups for pupils in mainstream school and early years providers and PRU budgets.

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.

Cumbria had been part of the Department for Education’s Delivering Better Value for SEND programme and had successfully applied for and received approval for a £1m grant for both Cumberland and Westmorland & Furness to support their improvement plans, the impact of which had been incorporated into Cumberland’s DSG management plan. This programme had ceased on 31 March 2025 with Cumberland Council having an underspend. As the service had identified committed spend against these monies, the Department for Education had confirmed that the underspend could be carried forward in 2025-26. These monies were forecast to be fully spent by 31 March 2026.

The report also included a table providing additional detail about the numbers of places funded within the forecast, some of these places being over the commissioned number for settings.

In 2025 the DfE had announced that there would be significant reforms to SEND which would be detailed in the Schools White Paper, also expected in 2025. The White Paper – Every Child Achieving and Thriving was published on Monday 23 February 2026.

Although guidance was still limited in relation to the financial implications from the white paper, elements had been published on the DfE website. The Office for Budget Responsibility indicated that DSG High Needs Block Deficits were forecast to reach £14bn nationally by 2027-28 and, as a result, government had announced the introduction of a High Needs Stability Grant to Local Authorities. This grant was said to be based on Section 251 Data, DSG S151 Assurance Data and Revenue Outturn data to determine the amount of grant and it has been indicated that the balance of this grant would equate to 90% of the DSG deficit balance as at 31 March 2026.

Guidance indicated that DfE would scrutinise the balances to ensure that only eligible spend was within this balance. There was also some indication that the amount used to calculate the grant would be the deficit less any underspends on other Dedicated Schools Grant Blocks. While this announcement was welcomed, it did mean that 10% of the deficit would remain with the Local Authority to fund.

Initial guidance indicated that this amount would be received in the 2026-27 financial year. To be eligible for the grant the local authority must meet local SEND reform plans conditions, and each local authority had been allocated a DfE colleague as well as a DfE finance expert to provide support. The initial meeting between Cumberland and DfE colleagues took place on Monday 2 February 2026.

It was expected that the High Needs Stability Grant would be a one-off payment to local authorities, so it was imperative that the council make sufficient transformation to manage the ‘in year’ balance year on year. The ‘in year’ deficit balance across all blocks of DSG in 2025/26 was forecast to be £4.228m, plus maintained school balances. This would require significant work including increased SEND sufficiency. The increase in special school places, RP and AP places within the Cumberland area would allow appropriate sufficiency to deliver places to Cumberland children and young people within the Cumberland area and to subsequently avoid children and young people needing to access provision out of area. The current shortfall in provision in Cumberland meant that several children and young people were attending independent special schools out of area at an average cost of £0.059m plus any home to school travel costs that, in some cases, were £0.027m per annum. Out of county provision was expensive for the local authority but there was an ambition to reduce this and for children and young people in Cumberland to be able to access appropriate provision in their local communities.

The main focus of the white paper was inclusion within mainstream schools, with the intention of reducing the burden on special schools. In Cumberland Council the number of special school places funded had increased from 486 in 2023-24 to 550 in 2025-26. There were, however, a high number of active tribunal cases for Cumberland children and young people which increased the burden on SEND colleagues as well as colleagues in the legal team who support the SEND service and the wider Children and Family Wellbeing directorate.

Work to create the SEND Reform Plan would require a collaborative effort not only from the Education, SEND and Inclusion team but also from wider colleagues within finance as well as partners within the NHS Trust, Academy Trusts and the DfE. If this work was not undertaken to an acceptable level, it was likely that the local authority would not receive the 90% High Needs Stability Grant and therefore the council would need to fund the full cumulative deficit at 31 March 2026, plus any in-year deficits in 2026-27 and 2027-28 when the statutory override ended on 31 March 2028.

It was forecast that the full deficit balance at 31 March 2028 could be circa £43m if work were not undertaken urgently. The Education, SEND and Inclusion Team alongside finance colleagues had begun work to mitigate this balance as much as possible however significant reform of the SEND service was also needed, along with invest to save initiatives, which was recognised by the publication of the Schools White Paper.

Since the White Paper had been published, the number of EHCP requests from parents and schools had increased significantly and this could impact the forecasts that had been reported as well as spending to 31 March 2026. It was likely that this increase in demand would continue beyond 31 March, potentially until the reforms were implemented and embedded. It was therefore important to monitor this and the impact on the system as a whole.

The announcement regarding the High Need Stability Grant had been welcomed but a significant amount of additional work from colleagues across a number of teams would be required to produce the Cumberland SEND Reform Plan by the specified deadline. Indications were that there would be a grading and allocation criteria/process to assess plans with LAs to be graded down if they were looking to increase provision. This was a concern because there had been no future proofing previously with many children and young people historically accessing expensive provision outside of Cumberland resulting in 'local' provision being required to meet current need combined with ensuring appropriate provision was available in future. Colleagues would need to ensure that the SEND Reform plan was appropriately balanced to reflect this when it was submitted. The High Needs Stability Grant would account for 90% of the SEND deficit at 31 March 2026 with the final 10% remaining with the LAs it was vital to consider ways to reduce in-year spending and address the continuing shortfall in budget.

Finally, the ongoing work in relation to sufficiency/SEND sufficiency was noted.

Cumberland Schools Forum noted the current projection on the HN Budget as at 31 December 2025.

7. <u>School Performance Statistics and Compliance</u>

Schools Forum considered a report setting out schools' performance data for Cumberland maintained schools and PRUs in relation to financial data returns. The report also included details about the LA Finance Team for transparency. This regular report highlighted the compliance to deadlines of both schools and the Local Authority Schools Finance Team and provided the Forum with the wider implications of such deadlines not being met effectively.

The Cumberland Schools Finance Team had been working to increase the dialogue between schools and the local authority as well as to improve the communications coming from the team.

As part of the LA Scheme for Financing of Schools and PRUs there was an expectation on every school to submit specific financial returns by set deadlines with a similar expectation on the Schools Finance Team to provide schools with the data needed to make informed decisions.

The report detailed the main deadlines in 2025-26 that maintained schools had been asked to comply with. Each return was set out with the compliance rates for all deadlines as well as the methods that had been used to inform and remind schools of the requirement to submit the returns.

As well as the maintained school deadlines, the Local Authority Schools Finance Team had also had 14 deadlines to meet - the publication of monthly tabs, circulation of the Excess Surplus Balances letters to schools, issuing of the October Budget Pack, publication of School Budget Shares and the May 2026 Budget Pack.

Some monthly tab reports had been issued late due to technical issues, but the Schools Finance Team were working actively with IT colleagues to ensure that the issues were rectified and although the position had improved the process still needed to improve further. The team were also working to improve communication around the dates that tabs could be expected to help schools to plan workloads more effectively.

As reported previously, there were also delays in the excess surplus balances process however allowances had been made to schools as a result. The October 2025 and May 2026 Budget Packs, as well as the Schools Budget Shares documents were all published on time.

The intention of this report was to highlight the compliance to deadlines of both schools and the Local Authority School Finance Team and to illustrate to Forum the wider implications of deadlines not being met effectively. By increasing communications and improving the relationship with schools it was hoped compliance would improve as the implications of missed deadlines could be identified.

Whilst reviewing the returns submitted from schools, the School Finance Team had also been increasing their challenge to deficit schools.

Meetings had been held with 25 schools, providing the opportunity to provide additional challenge to those schools with deficit and allow for open and frank discussions about the challenges faced and resources available to support schools. These meetings were generally held alongside the Schools Improvement Service which enabled all-round support to schools to be considered.

As part of the increased challenge to schools, and in line with the LA Scheme for Financing of Schools and PRUs, the local authority had removed financial delegation from one Cumberland school.

The decision of the Local Authority to take financial delegation from the school had not been taken lightly and had come after regular meetings with the school over a twelve-month period. However, the school had been unable to take the action required to achieve a balanced budget position. The removal of delegation meant that no expenditure could be incurred by the school without approval from the local authority and the school's budget was being managed by the local authority's finance team. The school's leadership team and governors did not have any powers to approve spend while these measures were in place.

A monitoring committee was now in place which allowed the LA and the school governors to monitor progress of the de-delegation and findings to date have shown an improvement in the financial position but given the level of deficit this work would need to continue for some time to come.

It was noted that progress had been made since delegation had been withdrawn; it would take time, but it was anticipated that the situation would improve in future.

During discussion of the report several points were made:

- The year-end deadline for cheque book schools had fallen during the previous week, however a number of returns remained outstanding; the majority of these were schools using a school bursary service. It was important that bursary services were able to provide the required data to schools for those schools to meet the required deadlines. While school finance did follow up with schools when deadlines were missed, capacity for this was limited.
- The number of school returns being submitted by the required deadlines had improved but it could be improved further; Schools Forum members were asked to share with their constituents the message about the importance of meeting deadlines and the implications of not.
- It had been reported that there was additional support in placed for schools and colleagues were urged to contact the school finance team if they had any concerns. Again, Schools Forum members were asked to share this message with their constituents, peers, and system leaders.
- When following up missing returns, the headteacher, school admin or business manager were contacted; schools were encouraged to involve governing bodies governing bodies when meetings, to work with and support individual schools, were arranged. It was suggested that perhaps AGAs could assist with following up deadlines as part of their regular school visits.
- In terms of schools missing deadlines there was no particular pattern or school that did so on a regular basis. There were some commonalities but generally it was more sporadic with a specific reason eg. waiting for data. If there was a new headteacher in place that was unfamiliar with processes, support was offered.

- All deadlines for finance returns were set out in the LA Scheme for Financing Schools https://www.cumberland.gov.uk/sites/default/files/2024-08/cumberland_la_scheme_for_financing_schools_and_prus_june_2024.pdf
  Deadlines were the same year on year; they were also highlighted in the regular finance newsletter shared with schools and they were available on the School Portal. Planning for deadlines at a school level was important and governing bodies should understand their responsibilities in relation to finance.
- Concerns about bursar capacity available in Cumberland was acknowledged and noted.
- It was suggested that it might be helpful to have a standard letter that could be sent to those schools with bursar support that were missing deadlines. LA colleagues would work together to draft a letter and to determine the most appropriate method to share with schools and governing bodies.

The Cumberland Schools Forum welcomed the report and noted the position and the implications of the delays in submissions.

8. High Needs Group – Modelling Requests

Based on discussions during the meeting, the following items were put forward:

- To consider when the year-end position is known any implications of the deficit and any further escalation that may be required.
- Post 16 Sufficiency – brought forward from High Needs Working Group on 24 February.
- Send Reform Plan – financial implications of the plan. The plan should have been finalised by the date of the next meeting; however, it would need to be signed off by Executive prior to being considered by the working group.

9. Date of Next Meeting

The next meeting of the Schools Forum would be held on 9 June 2026. The meeting would be held in the Cabinet Meeting Room, Cumbria House, Carlisle. This would be an in-person meeting beginning at 9.30am.

The High Need Working Group would meet on 7 May, beginning at 9.30am. Mayfield School was put forward as the venue for the meeting.

10. Any Other Business

i) RPA Option for Insurance

At the meeting held on 5 November, Schools Forum had considered a report setting out the option to move to RPA for insurance rather than continuing with the Council insurance scheme. Forum considered the following options:

1. Continue to have insurance arrangements arranged on behalf of maintained schools by Cumberland Council and voted on annually as part of de-delegated funds;
2. Defer the decision of whether to remain with the LA or move to the RPA for a year; during this period, establish a sub-group to consider and scrutinise the options in detail before reporting back to Schools Forum ahead of the final decision; or
3. Cease the current arrangement and opt into the RPA agreement instead, from 1 April 2026.

Following a unanimous vote, Schools Forum agreed that option two, to defer the decision for 12 months. During that time, a small task and finish group was to be established to consider the proposal in detail before bringing back a recommendation to Schools Forum at the meeting on 10 September 2026.
James Blackwell maintained primary representative volunteered to join the group, further representatives would be sought from maintained schools and could be part of a school SLT, headteacher, a school business manager or chair of governors/ governor.

It was suggested that the task and finish group should meet twice; initially to consider the options in detail before taking away to discuss and share with constituent schools before meeting again to come to a decision and form a recommendation to Schools Forum.

There were no other items of business.

NS/ES&I
March 2026