CUMBERLAND SCHOOLS FORUM

Draft MINUTES OF THE MEETING HELD ON
9 June 2026
Cabinet Meeting Room, Cumbria House, Carlisle
(and Microsoft Teams)

PRESENT

James Blackwell	(Maintained Primary Schools)
Danny Gee	(PRUs)
David Grimshaw	(Maintained Primary Schools)
Rhiannon Hughes	(Maintained Nursery Schools)
Ruth Lawler	(Secondary Academy)
Joanne Lloyd	(Maintained Primary Schools)
Chris McAree	(Secondary Academy)
Sophie McCabe	(Maintained Special Schools)
Joanne Ormond	(Maintained Primary Schools)
Mandie Phinn	(Non-teaching Unions)
Michael Smillie	(Secondary Academy)
Kris Williams	(Special Academy)

Officers in Attendance:

Emma Hamer	(Assistant Director – Education, SEND & Inclusion)
Sarah Flockton	(Senior Manager – Strategic Development)
Paula Gledhill	(Interim Group Accountant)
Sophie Scott	(Finance Manager – Education, SEND & Inclusion)
Jo Richardson	(HR Workforce & Policy Lead – Item 5)
Nicola Shiels	(Forum Support)

Observers:
None

Apologies for Absence

Natalie Bevan	(SEND & AP Lead and Transformation Manager)
Nicky Corfield	(Maintained Primary Schools)
Andy Curtis	(Teachers' Associations)
Terentius Jackson	(Maintained Primary Schools)
Sue Lowndes	(Interim Service Manager – Learning Improvement Service)
Elaine Lynch	(Cumberland Portfolio – Lifelong Learning & Development)
Declan McArdle	(Maintained Secondary)

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. Minutes of Previous Meeting and Matters Arising

The minutes of the meeting held on 18 March 2026 were agreed as an accurate record.

Matters Arising:

i) Item 5 – Draft De-delegated Contingency Budget Monitoring Q3 2025-26: noted that the Q3 position for this report was unchanged when published.

ii) Item 6 – Draft High Needs Block Budget Monitoring Q3 2025-26: noted that the Q3 position for this report was unchanged when published.

iii) Item 10 – RPA Option for Schools: it was reported that no volunteers from schools had been received to join a group to further consider the RPA/insurance options for schools (note: James Blackwell did volunteer at March meeting). Maintained school representative agreed that Rhiannon Hughes and Joanne Lloyd, along with James Blackwell, would meet to consider the RPA option/insurance for schools with a view to reporting back findings early in the autumn term 2026. These views would help to inform a further report to Schools Forum setting out RPA/insurance for maintained schools.

There were no other matters arising.

4. Trade Union Facilities Time – Verbal Update

Jo Richardson, HR Workforce and Policy Lead joined the meeting. She explained that the team led on the development of HR policies and employee relations, linking in and developing relationships with trade unions.

The Chair declared an interest due also having a responsibility to undertake some association activity on behalf of ASCL.

The trade union facility time agreement had not been considered by Schools Forum for some time, and a report would be presented to future meeting. The report would set out the agreement that was currently applied and review the level of FTE paid time covered dependent on the number of employees in each school. The agreement contributed to the costs incurred by schools when releasing staff to undertake trade union duties. Until a revised agreement was considered by Schools Forum, the current arrangements would roll forward.

Feedback on the review and development of HR policies was also welcomed.

The agreement that was in place was valuable and it was felt that it would be beneficial for it to continue. In terms of employment relations, most staff followed national terms and

conditions so it was appropriate that there was alignment and consistency. The agreement covered colleagues to support employees through processes such as job evaluation exercises and testing disputes, for example, equal pay; it was important to maintain an effective employer/employee link and not to work in isolation.

The current agreement had been in place for a number of years and it was noted that headteachers would welcome an updated agreement that set out conditions related to releasing staff together with revised payment information. Forum was advised that the current agreement could be reviewed but only within the amount of funding that was available.

The Workforce and Policy Team also supported a policy group that considered updated policies; the group included association representatives. The intention was to review how the group worked and to improve links with school HR providers regarding the adoption of policies. As this aspect of the team's work was not related to school finance further consideration would be given to the most appropriate mechanism to discuss and collect feedback on policy updates.

As the trade union facility time agreement had not been considered since 2014 it was timely that it should come back to Schools Forum for consideration. A report would be presented to a future meeting.

Schools Forum noted the verbal update and agreed that the current agreement would be shared with the draft minutes of this meeting.

5. SEND Reform Plan – Verbal Update

Emma Hamer, Assistant Director – Education, SEND & Inclusion provided a verbal update on the SEND Reform Plan.

In mid-March, LAs were notified that a High Needs Facilities Grant would potentially be available on approval of a SEND Reform Plan at a local level. The grant allocated would be used against any high needs deficit accrued up to the end of the 2025-26 financial year.

The first draft of the plan was submitted by the 19 May deadline and would be reviewed by a DfE advisory panel. Initial feedback on the plan had been positive and following a meeting with the DfE Adviser the plan would be finalised then signed off by senior council officers and the partnership, including both ICBs, before final submission by 19 June 2026. Colleagues from the LA and across the partnership had worked together to develop the plan. Jo Atkinson, Director of Corporate & Transformation Services had been designated as SRO so had been closely involved with the process; the requirements of the plan had also been presented to the council's Senior Leadership Team.

Two days before 19 May (submission of draft plan) DfE had shared new documentation with all LAs that had to be considered in relation to the plan which had presented some challenge. Further guidance relating to Experts at Hand had also been issued this week however this would only need to be built into the plan for Q1 before submission, with the remaining quarters to be completed at a later date. Despite this, the document was of a good standard.

A total of 150 plans would be submitted to DfE to undergo sign-off procedures meaning that it was unlikely that outcomes would be communicated to LAs until September or October of this year. The plan would include a number of illustrated policy themes that

would set out the changes including one on finance detailing mitigation options should the council fail to receive the grant.

Not all plans may not be signed off at the first iteration but the Cumberland plan that was submitted would be as strong as possible. Thanks were expressed to all colleagues across that partnership who had been involved in developing the plan to date.

Several comments and observations were made, including:

- This was a significant lever to receive a funding allocation that would cover 90% of the high needs deficit accrued up to the end of 2025/26.
- LAs often worked with several different ICBs; DfE had indicated that they would moderate plans to ensure a uniform approach for CYP and families. There was also a need to be mindful of structural changes that were happening in different ICBs.
- It was suggested that it would be helpful for schools if there was a brief and clear readiness plan so that everyone was prepared to support and back the plan. To ensure this it might be helpful to increase the profile of 'what readiness looks like?' As the SEND & AP Partnership Board included school representatives, those representatives could assist with sharing and dissemination of information and there would continue to be regular updates in the various newsletters and communications published by the LA.

Schools Forum were informed that financial reporting would be adjusted with more and additional new reporting to be requested from schools. Additional reporting requirements had been raised with DfE due to current difficulties for schools in meeting deadlines with addition additional returns. The criteria that DfE would mark against would have to be submitted on a quarterly basis so any new reporting requirements would be non-negotiable in terms of timelines.

Schools Forum noted that draft plan had been submitted and colleagues were now working on revisions before the final plan was submitted.

6. School Performance Statistics and Compliance

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 was a regular report highlighting 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 continued to work 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. It was noted that late submission of returns resulted in LA school finance colleagues spending time following up returns; every school budget plan was checked by the team and additional follow-up work could delay the checking process.

As well as the maintained school deadlines, the Local Authority Schools Finance Team were also obliged to meet the deadlines set upon them. These included the publication of monthly tabs, publication of School Budget Shares by 28 February and publication of three-year budget packs. The October 2025 and May 2026 Budget Packs were published on time as were the Schools Budget Shares documents.

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 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 and support to deficit schools.

Meetings had been held with 26 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 School Improvement Service which enabled all-round support to schools to be considered. Due to year-end workload commitments the frequency of these meetings had slowed however, once the three-year budget packs received in May had been reviewed this work would resume at pace.

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 was not taken lightly and had resulted in a significant amount of work for both the school and the LA but good progress had been made in recent months to understand what was required to bring a balanced in-year budget. Work was ongoing to reduce expenditure going forward and to review all contracts in place within the school; the school leadership team had worked closely with the Learning Improvement Service and the Schools Finance Team and the engagement had been invaluable to the works needed.

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

During discussion of the report several points were made:

- Bank reconciliation P11 had 38% of returns remaining outstanding which was likely due to a focus being on year-end.
- Commonality around those schools submitting 3-year budget packs late potentially related to governing body meetings not having been held by the required deadlines or issues with bursary support. It was acknowledged that there had been some

discrepancies with EY funding and LA colleagues appreciated that this was an issue. Following the meeting further analysis of the late returns was undertaken and is set out below; this includes the EY element noted above:

May Budget Submissions - Late Returns	Count of School	% Based on all schools
School went back to bursar to action changes	**1**	**1%**
Early Years Funding - Yes	1	1%
Has not been signed off by governors	**2**	**2%**
Early Years Funding - No	1	1%
Early Years Funding - Yes	1	1%
Technical issues	**4**	**3%**
Early Years Funding - No	1	1%
Early Years Funding - Yes	3	2%
Issues around staffing resource	**2**	**2%**
Early Years Funding - No	1	1%
Early Years Funding - Yes	1	1%
No reasoning provided for delay	**14**	**11%**
Early Years Funding - No	7	6%
Early Years Funding - Yes	7	6%
Grand Total	**23**	**19%**

- Reminders about upcoming deadlines were included in the regular newsletter produced by the School Finance Team and were sent to schools via the Assistant Director's weekly communication. Further letters would be sent to those schools with returns remaining outstanding. As well as this, a letter would be sent to all governing bodies as a reminder that meetings should be scheduled in line with the deadlines required for submitting returns.
- The LA continued to work with the school where delegation had been withdrawn to secure an in-year balanced budget as well as a sustainable model moving forward. It was emphasised again that this was not a decision that had been taken lightly and while it had involved a lot of additional work, officers would take a similar decision in future if deemed appropriate.
- Concern was expressed about the number of schools that were in a deficit position whilst also in the window for Ofsted inspection and the level of potential financial risk from those schools. It was agreed that a report or table setting out this information would be available for the next meeting of Schools Forum.

Looking ahead, there needed to be a wider understanding that deadlines were not for negotiation. This would be communicated via robust letters to governing body chairs clearly setting out the responsibilities of headteachers and governing bodies. In previous years, deadlines had not been challenged but this needed to change to enable colleagues to focus on actual school finance tasks rather than following up deadlines.

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

7. Cumberland Schools Forum Membership – School Members

A report was presented that set out the current membership of Schools Forum. Membership had been reviewed to maintain a balance between primary, secondary and academy members that was broadly proportionate to the pupil numbers in each category.

Schools Forum Regulations 2012 required that schools and academies should have broadly proportionate representation according to pupil numbers in each category. Local authorities were required to ensure that their Schools Forum was compliant with this requirement based on the pupil numbers in each category. Where a local authority maintained one or more special school the Schools Forum must have at least one schools member from that sector; the same applied to nursery schools and pupil referral units (PRUs). As well as this, there must be one member for special academies, including free schools, and alternative provision academies, if such exist in the local authority area.

The Cumberland Schools Forum was established following Local Government Reorganisation in April 2023. In Spring 2025 the constitution of the Schools Forum was reviewed and it was proposed that the full membership of the forum should be renewed with the introduction of a two-year term of office. During this exercise, a number of school members were re-confirmed while several had joined the Schools Forum in the period since September 2025.

School members did not need to be headteachers but could be school business or finance managers or governors with a good understanding of financial management systems in schools.

It was emphasised that nominations should only come from an institution with a record of sound financial management, and where any budget deficit was being addressed via an agreed deficit budget management plan. Nominations from institutions with increasing deficits were not permitted.

The Schools Forum was currently made up of 16 school members, 7 maintained (6 primary and 1 secondary), 5 academy (4 secondary and 1 primary), 4 others (1 special, 1 special academy, 1 nursery and 1 PRU) and 6 non-school members. Based on pupil numbers reported in the January 2026 census update the split of school members had been reviewed; details were set out in the report. It was proposed that, to maintain a membership that was broadly proportionate to the pupil numbers in each category, from September 2026, the split of school members should remain unchanged.

Regular attendance at meetings was important to ensure that all constituencies were properly represented. Members should represent the views of their constituency as a whole and provide constituent schools with regular updates about Schools Forum business. Substitutes were not permitted except for in very exceptional circumstances with any substitute having had to have undergone full training.
Attendance at meetings was monitored and a copy of the record of attendance at meetings since September 2025 had been circulated for information.

There was currently 1 school member vacancy for a primary academy representative. When a vacancy arose, the relevant constituency was responsible for the election of a new representative. CASH and PHA were asked to assist with securing all school members. All

nominations were reviewed by the finance team to advise on the financial position of the school.

It was also noted that Joanne Ormond, one of the maintained primary school representatives was retiring shortly so this would create an additional vacancy which would need to be filled. Forum thanked Joanne for her attendance and contribution to meetings during her time as a member.

Cumberland Schools Forum noted the report and agreed to maintain the current split between maintained schools and academy representatives to ensure an appropriate proportionate split that effectively reflects the profile of schools across the authority to ensure that there was not an in-built bias towards any one phase or group.

8. High Needs Group – Modelling Requests

The meeting of the High Needs Group scheduled for May 2026 had been cancelled due to a number of apologies as well an officer requirement to commit time to develop the SEND Reform Plan. The group was next scheduled to meet on 6 October however there was some concern about the length of time before the group would meet again.

It was therefore agreed that the next meeting of the High Needs Group should be held immediately after the Schools Forum meeting on 10 September 2026. It was suggested that the agenda for this meeting should include and item on agenda setting and a plan for changes that could be anticipated during the year.

9. Date of Next Meeting

The next meeting of the Schools Forum would be held on 10 September 2026. The meeting would be held in the Council Chamber, Allerdale House, Workington. This would be an in-person meeting beginning at 9.30am. The High Needs Working Group would meet immediately following the Schools Form meeting (10 September 2026).

10. Any Other Business

School SEND Funding – a query regarding the method in place for funding pupils and how pay award were applied was raised as there appeared to be a disconnect between the funding bands and special school funding. It was noted that the funding bands had not been increased in recent years and it would be helpful to understand what the implications of any change or increase.

There were no other items of business.

NS/ES&I
June 2026