CUMBERLAND SCHOOLS FORUM

Draft MINUTES OF THE MEETING HELD ON
12 October 2026
(Microsoft Teams)

PRESENT

Nicky Corfield	(Maintained Primary Schools)
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)
Lianne Lomas	(RC Diocese)
Elaine Lynch	(Cumberland Portfolio – Lifelong Learning & Development)
Chris McAree	(Secondary Academy)
Sophie McCabe	(Maintained Special Schools)
Mandie Phinn	(Non-teaching Associations)

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)
James Blackwell	(Maintained Primary Schools)
Nicky Corfield	(Maintained Primary Schools)
Joanne Lloyd	(Maintained Primary Schools)
Declan McArdle	(Maintained Secondary Schools)
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

There were no declarations of interest at this stage.

3. School Funding Formula 2027-28

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 2027-28 had not yet been published and there was no indication of when these would be published. However, the schools national funding formula summary policy document, which was usually published alongside the indicative allocations, had been published 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.

Similarly, if a balance remained within the Schools Block after applying the NFF in full and after considering 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.

LAs were required to consult schools on whether to adopt the NFF in full as well as how to deal with a shortfall or surplus in NFF. The outcome of the consultation would be presented to Schools Forum on 4 November to make a recommendation to the Council Executive; this decision would then be ratified when Executive met on 14 December.

The lead in timescales for Executive, time needed to consult schools and report the outcomes to Schools Forum were such that it was proposed that the consultation should be based on the principles of applying the NFF in full and the treatment of a shortfall or surplus in the formula. There would be no modelling of potential budget shares as the data was unavailable.

The Forum report set out the rationale for the proposal together with a draft consultation paper that set out three recommended questions for schools. Following this meeting, the consultation would be finalised and launched on 14 October for a period of two weeks.

The three questions set out in the consultation paper were:

i) Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to schools in 2027/28?
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.

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 2026-27, 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 2025, after applying the NFF in full and considering the Growth Fund budget of £0.298m, there was a shortfall of £0.485m which the AWPU had to be reduced to account for.

DfE had announced that the schools budget support grant (SBSG) would be rolled into the NFF for 2027-28. There would also be a Teachers' pension employer contribution funding adjustment in 2027-28 which would reduce funding for schools in line with the reduction rate.

When Schools Forum considered the 2026-27 draft school funding formula consultation paper it was suggested that the questions might be set out differently in future consultation papers. Forum members were therefore asked to advise how best to set out the questions for colleagues in schools.

It was proposed that a similar methodology be used as in previous years ie. if sufficient funding, apply NFF in full; if there was a surplus then up to 0.5% would be transferred to HNB and if funding was insufficient, AWPU levels would be reduced. Figures would be applied after taking into account the Growth Fund.

In discussing the report and the draft consultation paper, Forum considered each consultation question:

Q1 – Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to schools in 2027-28?

Schools Forum supported the inclusion Q1, as above.

Q2 – Do you agree with your Schools Forum that if there is a shortfall in Schools Block funding after applying the National Funding Formula, that this is managed by reducing the basic per pupil funding factor values in the formula.

There was a view that paragraph 18 of the consultation paper wasn't clear enough in setting out where funding would come from if AWPU was not reduced proportionately to a level that was affordable. Subject to the relevant section of the consultation document being reviewed, Schools Forum supported the inclusion of Q2.

Q3 – Do you agree that, if there is any Schools Block funding remaining after allocating the school funding formula to schools using the National Funding Formula, it should be transferred to the High Needs Block? (up to a maximum of 0.5% of the schools block)

Forum discussed this question in more detail. In particular, in relation to the possible transfer of up to 0.5% to the HNB. It was noted that in the previous two years, application of the formula had been unaffordable and it felt unlikely that there would be a surplus for 2027-28.

A further view was that there was a good case to continue using the National Funding Formula but if there was a remaining surplus, that this should be available for schools rather than transferred to the HNB. It was therefore suggested the proposal should be to use a proportionate addition opposite to the levy taken in previous years where there had been a shortfall and schools did receive the NFF in full. Schools in receipt of MFG would not receive anything as they had been protected in previous years; Q3 to be amended on this basis.

Further suggestions included separating Q£ into two questions or adding options such as:
i) Transfer up to 0.5% to HNB
ii) Retain and allocate to schools with permitted levels
iii) Other – please specify
iv) Unsure

It was important that the consultation paper included a balanced context for headteachers and partners, reference to the HNB deficit and was set out in a way that encouraged schools to respond. The level of response had been low in the previous two years, so Forum members were asked to ensure that the schools they represented were expecting the consultation as well as encourage responses.

Subject to the addition of options as set out above, Schools Forum supported the inclusion of Q3.

Schools Forum would be given notice that the consultation was opening so that they could alert other schools. The consultation would also be included in the weekly e-mail to schools and would be available on the School Portal.

As a result of the votes on each question, set out above, the consultation document would be amended before circulating to schools and the Forum:

- noted that the provisional DSG allocations for 2027-28 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 2027-28;
- supported the recommendation to apply the following principles if there was a shortfall or remaining balance after applying the National Funding Formula in full and after considering the growth fund budget:
    a) reduce the basic per pupil funding factor values in the formula if there was a shortfall;
    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, subject to the adding a more detailed explanation to Q2 and options under Q3, the draft consultation document at Appendix 1 which included three recommended questions to ask schools.

4. Date of Next Meeting

The next meeting of the Schools Forum would be held on Wednesday, 4 November 2026. This would be an in-person meeting, held in the Cabinet Meeting Room at Cumbria House in Carlisle starting at 9.30am.

5. Any Other Business

There were no other items of business.

NS/ES&I
October 2026