

Norfolk Schools Forum

Minutes of the Meeting held on Friday 17 May 2024 at 9am in the Cranworth Room, County Hall

Present

Martin White (Chair)
Steven Dewing
Lacey Douglass
Mike Grimble
Glyn Hambling
Clare Jones
Joanne Philpott
Sarah Porter
Rachel Quick
Sarah Shirras
Matthew Smith
Joanna Tuttle
Vicky Warnes

Organisation

Nebula Federation
Sapientia Education Trust
Freelance Early Years Advisor
Avenue Junior School
Unity Education Trust
Broad Horizons Education Trust
City of Norwich School
The Heart Education Trust
The Wherry School
St. Williams Primary School
Sheringham Woodfields School
Aylsham High School
Joint Consultative Committee

Representing

Maintained Primary Governors
Academies
Early Years Representative
Maintained Primary Governors
Alternative Provision
Academies
Academies
Academies
Special School Academy
Maintained Primary Schools
Maintained Special Schools
Maintained Secondary Schools
Joint Consultative Committee

Local Authority Officers

Martin Brock	Accountant (Schools, Special Educational Needs and Early Years)
John Crowley	Assistant Director – Education, Intelligence and Effectiveness
Dawn Filtness	Finance Business Partner (Children’s Services)
Sam Fletcher	Assistant Director – Education Infrastructure and Partnerships
Simon Paylor	Strategic Commissioner – Health and Disability
Nicki Rider	Assistant Director SEN and Alternative Provision Strategy and Sufficiency
Laine Tisdall	Committee Officer, Democratic Services
Sara Tough OBE	Executive Director of Children’s Services
James Wilson	Director for Sufficiency Planning and Education Strategy

1. Apologies and substitutions

- 1.1 Apologies were received from Adrian Ball, Martin Colbourne, Carole Jacques, David Hicks and Bob Groome.

2. Minutes

- 2.1 The minutes of the meeting held on the 13 March 2024 were agreed as a true record of proceedings.

3. Matters Arising

- 3.1 The declaration of interest form, which was circulated to Forum Members in March, was to be reissued.
- 3.2 Local First Inclusion – Steve Bush from Cambridgeshire Communities Services was formerly invited to the July meeting of the Norfolk Schools Forum, to set out methods of collaborative working between health providers and schools.

3.3 A working group to discuss Shared Parental Leave was set up between Forum Members and officers, with the first meeting held W/C the 13 May 2024. An update from this working group was scheduled for a future meeting of the Norfolk Schools Forum.

4. Strategic Planning (inc. Local First Inclusion) Programme Update

4.1 Forum Members received the annexed report (4).

4.2 Officers introduced the report, which provided key extracts from Norfolk County Council's revised DSG plan. The plan was submitted to the Department for Education (DfE) on the 23 April 2024.

4.3 Officers introduced key elements of the report to the Schools Forum. A presentation was shown concurrently to the room:

- The Local First Inclusion (LFI) plan in Norfolk was built around the understanding that Special Education Needs (SEN) could be met in a mainstream educational environment.
- Children's Services were currently 18 months into the current iteration of the plan. A significant level of additional funding and resource has been available to support the SEN cohort in schools. There had also been targeted investment in additional provision. It was stressed that the plan had now reached a critical point where the measurable impact of the LFI programme should be seen.
- The number of students in Norfolk who were either in specialist education or excluded remained higher than the national average, which was a concern to Children's Services and being closely monitored.
- Due to the increased pressures including ongoing high volume of EHCP/Special School referrals and increased costs of Element 3 funding, the LFI/Safety Valve plan was being renegotiated with the DfE.
- The aim of Norfolk County Council remained to ensure the plan was working correctly so that students were in the right place, receiving the correct level of support. Officers stated that the next 12 months were critical to achieving this. It was stressed that the budget could not be overspent further. Collective leadership was required to ensure the aims were met. Officers expressed confidence that Children's Services could rise to the challenge to achieve the targets set out through working in collaboration with schools.
- Due to the increase in demand, it was likely that an eight-year period was required to deliver an in-year balanced budget, with an in-year deficit of £50m currently forecast. The LFI was not expected to be in balance until 2030/31 and as a result, the cumulative deficit would increase significantly over this period. It was acknowledged that this was a challenging scenario, as the LFI was currently not compliant with the regulations set down by the DfE. Children's Services were in dialogue with the DfE regarding this, with it being felt that they were understanding of the underlying issues being faced. Further data was planned to be supplied to the DfE at the beginning of June 2024.
- While the strategy remained unchanged, new elements were to be added to the LFI. Conversations were to take place to see if there were any ways of changing the way the partnership worked and delivered together. The presentation illustrated potential "before and after" changes. There was a need to move towards more collective ways of working between Children's Services and schools across Norfolk.

- Children's Services had developed a new data tool, which enabled officers to extrapolate data across Norfolk on various indicators to measure the performance of the LFI plan. An example dataset was shown to the Schools Forum and explained. Comparative analysis would inform Children's Services as to what was working and where improvements were required. It was stressed that while the tool was sophisticated, it had to be carefully used to ensure that incorrect conclusions were not reached.
- A new collaborative LFI model was scheduled to commence at the start of the 2024/25 school term in September 2024. Norfolk would be divided into fifteen zones, each having a local zone inclusion partnership which aimed to bring key personnel together around challenges faced by the LFI. The model ultimately aimed to help achieve the best outcomes for children while making the most efficient use of resources.
- New inclusion partnerships were to be formed between specialist schools and the mainstream, with the aim being to utilise expertise from the former setting to support mainstream inclusion of SEN students. At present, Norfolk under-utilised the dual registration model where students would be registered simultaneously with a specialist and mainstream school. There was scope to substantially expand dual registration in the coming years, with a revised approach to allocating specialist school places was due to commence in September 2024.
- A core part of the LFI programme was Element 3 funding. The budget had increased from £5.7m in 2018/19 to £36.6m in 2024/25. Financial pressures were identified, with Children's Services currently in negotiations with the DfE regarding the next steps to be taken. A £23m budget was set for 2023/24; however, the overall outturn was £35.3m. It was confirmed that NCC had submitted a draft revised plan to the DfE (23 April). Work was ongoing and therefore the range of proposed budget figures for Element 3 and other parts of the LFI programme were indicative, e.g. there was an illustration of budget increase for 2024/25 of around £36m and with this accounting for inflation. Presentation slides illustrated how Element 3 funding was being modelled for the remainder of the 2020s.
- It was stressed that Norfolk needed to live within its means while acknowledging that there had been significant investment over the prior couple of years. Sustainability was key to the success of the plan, as any further budget increases would likely undermine the credibility of the LFI with the DfE. As a result, changes were now required to the LFI model, to be implemented as rapidly as possible. A workshop was scheduled for Thursday 23 May 2024 to discuss and sketch out the next stages of Element 3. The Chair and several Forum Members agreed to participate.

4.4 The following points were raised and discussed:

- A Forum Member queried if Norfolk was the only local authority experiencing issues delivering a balanced budget. Officers stated that a number of local authorities were in the same position and part of the safety valve. While this was a national issue, it was stressed that there were local issues affecting Norfolk that could not be ignored. The trajectory was not expected to change following the General Election, likely to be called later in 2024. Officers confirmed that a number of items were being discussed with the DfE, particularly with regard to financial and policy objectives.

- A Forum Member commented there was a perception that the national narrative related to the reduction of services, but that Norfolk seemed to be increasing the level of provision by taking a more positive approach to the situation. Officers stated that communication was critical in this area.
- A Forum Member queried if schools needed to be proactive to solve issues or if wider local authority funding would be made available, citing comments from another local authority regarding their financial situation. Officers confirmed there would be funding available for the programme, a decision supported by local politicians. A point had been reached where the programme needed to be seen to be working.
- The Chair asked if there was any pressure on Children's Services to repay the DSG cumulative deficit. Officers stated there would be pressure as, ultimately, Norfolk County Council had to acknowledge the deficit on the balance sheet prior to any final resolution with the DfE.
- The Chair and Forum Members queried the concept of shared understanding, emphasising that this had to bring parents on board. Officers agreed this was important but currently inconsistent across the LFI. Improving shared understanding would enable Norfolk to be in a stronger position going forward.
- A Forum Member expressed concern regarding the various pressures faced by schools at present for children to achieve expected standards, stating this was exacerbated if teachers had a significant cohort of SEN students. There was also concern that there was a two-level judgement within schools, with teachers under scrutiny to meet SEND needs well, but this did not mean they were meeting age-related expectations. It was therefore important that schools and Children's Services challenged inspectors from OFSTED and celebrate the achievements of schools in Norfolk. Headteachers were currently facing a perfect storm of pressure from every direction, therefore meaning it was prudent that a pragmatic approach be taken. Concern was also expressed that it appeared Norfolk was taking the approach that schools would be taking on a number of local authority responsibilities on top of the pressures already being experienced. This would potentially result in resistance from the schools sector. Officers acknowledged the concerns raised, stating that it was critical to work collaboratively. However, the LA believed that there was clarity on the respective responsibilities of schools and Children's Services, as reflected in the current DfE SEND & AP Improvement Plan
- A Forum Member stated they were pleased about the introduction of dual registration for special school placements but requested clarity on the proposed timeline for satellite schools, given the pressures on them to balance their budgets. Officers stated that while there was no programmed timeline at present as this was a new development in the LFI programme, however, options would be worked up during the next academic year.
- A Forum Member stated there was need for message consistency across Norfolk, as it appeared that the actions of those on ground was different to what was in the strategy. Ensuring that everyone across the strategy was on-message was a matter of importance for Children's Services.

- A Forum Member stated that while the new initiatives were to be welcomed, the local zone community partnerships appeared to be similar to the former “clusters” which were in operation the 2010s. Concern was expressed that Children’s Services needed to work at pace to get the initiative off the ground and that this proposal would cause further fragmentation of the strategy, given the pressures facing Children’s Services and schools in Norfolk. The Chair agreed with this, requesting further details to mitigate concerns regarding workload levels. A pragmatic approach was prudent given the current circumstances. Officers stated the detail would be set out over the next term. The partnerships would differ from the clusters as this would cut down bureaucracy to access services.
- A Forum Member asked how the zone community partnerships would be compared to each other, as there was the possibility that one zone may contain all of the best practices being utilised, while another zone could be considered weaker. Concern was expressed that this could lead to effective echo chambers limiting the amount of expertise that could be shared between zones. An officer stated that while the exact detail of the operation of the zones had yet to be finalised, collaborative work between zones was expected by Children’s Services as a cornerstone of the model.
- The Chair queried if the Element 3 workshop would enable the Schools Forum to challenge and contribute to LFI strategy. Officers confirmed this was the case, acknowledging that none of the available options were straightforward. The views of different Forum Members were required to scrutinise the positive and negative aspects of each option.
- A Forum Member expressed grave concern regarding the Element 3 funding needed to be agreed by the end of June 2024, as the budgets for schools and academies had to be finalised by the middle of July at the latest, leaving no time for a consultation to be held regarding any proposed changes. Officers clarified the situation, emphasising that there was no reduction in the budget. The funding envelope was being maintained at a higher level than first forecast, however, the overspend level did need to reduce.
- A Forum Member queried if the LA was considering devolved Element 3 funding for the 2025/26 academic year. Concern was also expressed that if it was the case, this would represent substantial change in a short time period, with a knock-on impact on schools to readjust to the new parameters. Officers stated a two-stage approach would be utilised, with some changes being introduced in September 2024 and this would be followed by Fair Funding consultation on any changes for April / September 2025.
- A Forum Member commented that school budgets were proving difficult to scope out, as it was uncertain that SEN funding would be available for the entirety of a three-year plan. School budgets were already under pressure.
- A Forum Member remarked that she was pleased to hear there were attempts being made towards a more equitable distribution of funding in Norfolk.

4.6 The Norfolk Schools Forum **RESOLVED** the following:

1. To **NOTE** the progress shared in relation to the EMS process, related 'stock-take' and DSG remodelling work submitted to DfE on 23rd April 2024.
2. To **COMMENT, SUPPORT** and **CHALLENGE** regarding the next steps plans for the Local First Inclusion programme, in particular, with a commitment to ensure strategic leadership to jointly achieve the revised and explicit aims of the LFI programme.
3. To **COMMENT, SUPPORT** and **CHALLENGE** regarding the Dedicated Schools Grant (DSG) remodelling work, in particular, with regard to Norfolk County Council's revised approach to Element 3 funding and allocation of specialist places; supporting the ongoing aim to meet needs of children and young people more effectively through early intervention without the need for Education, Health and Care plans where 'ordinarily available' funding, resources, support and guidance can be secured within SEN Support.
4. To **AGREE** to the formation of a sub-group to consider the detail of a revised approach to Element 3 funding, including expected arrangements for reporting back to Schools Forum.
5. To **CONFIRM** the appointment of representatives to the sub-group as referenced in Recommendation 4.

5. **Dedicated Schools Grant Final Outturn and Balances 2023-24**

5.1 Forum Members received the annexed report (5).

5.2 Officers introduced the report, which provided information regarding the overall Dedicated Schools Grant (DSG) outturn position for 2023/24, ahead of Norfolk County Council approving the final outturn position and balances at a meeting of its Cabinet in June 2024.

5.3 Officers introduced key elements of the report to the Schools Forum:

- There was a net overspend of £43.136m during 2023/24. This was largely concentrated within the High Needs block; however, other blocks recorded small underspends which offset the net figure.
- A £2m portion of Safety Valve funding from the DfE was received in 2023/24, with a further £5.5m contributed by the local authority.
- As of the 31 March 2024, the cumulative DSG deficit on reserves stood at £81.513m.
- The Schools Block recorded a (£0.161m) underspend as opposed to the approximately £600m budget. This was largely due to rate refunds, as rates had to be estimated at the start of the budget setting process. These were slightly overestimated for 2023/24. In addition, rate revaluations and credits received when schools converted to academies contributed to the underspend.
- The Central block recorded a small underspend of (£0.005m), which was then reallocated to offset the DSG deficit.
- The High Needs block overspend of £43.712m was due to the increased allocation in inclusion methods. A £25m overspend was originally anticipated, based on previous safety valve planning.
- The Early Years block recorded an underspend of (£0.410m), which was then reallocated to offset the DSG deficit.

- School balances - there was an increase in the surplus balances of maintained schools' balances of £0.218m (after the deduction of £0.511m of surplus balances of schools that have converted since the end of the previous financial year). Deficit balances increased by £0.684m. The total level of balances held by maintained schools reduced by £0.466m overall.

5.4 The following point was raised and discussed:

- A Forum Member asked if the figures for Early Years were adjusted across the financial year as data was received. Officers confirmed the position in the report contained an estimate for July 2024, as it was expected that the DfE would request back £1.7m.

5.5 The Norfolk Schools Forum **RESOLVED** the following:

1. To **NOTE** the report.
2. To **NOTE** appropriate comments from Forum Members, to be shared with Norfolk County Council's Cabinet prior to their meeting in June 2024.

6. School Catering Update

6.1 Officers provided a verbal update on this item to the Schools Forum. The following key elements were highlighted:

- Different tender options were being considered, with several meetings with schools taking place to understand their needs.
- Merritt-Harrison were the successful bidder for the consultation, as they had previous experience working with Gloucestershire County Council. They were engaged between January and March 2024, culminating in direct visits to six schools over a two day period. The visits involved meeting with students along with school leaders. A survey went out to schools in December 2023 to canvass opinions. Some of the data collated was of sub-standard quality, however, enough was collated to inform decision-making going forward.
- One of the options available was to considering renegotiating contracts with Norse. This produced a mixed response; however, this was caveated that only a limited sample size was available (30 responses out of 109 surveys).
- The option for schools making their own arrangements, despite limited data available, produced a negative response.
- The competitive re-procurement option produced a split response, meaning there was no real democratic mandate to proceed. This option was considered risky, as there was a likelihood of schools not signing up prior to the contract going out to tender. In addition, there was a chance of there being limited or no bidders.
- Renegotiating the contract was not a risk-free option, as any renegotiation would need to be on the basis of new terms and a different relationship. The consultants developed a new service spec which could be utilised regardless of which option was taken.

6.2 The following points were raised and discussed:

- The Chair thanked Officers for their work towards resolving a complex situation.
- A Forum Member queried if there was any reference to host kitchens in the discussions with consultants, particularly with regard to schools that did not have their own kitchen facilities. Officers confirmed this was under consideration.
- A Forum Member commented that it appeared there were strong bidders and competitive tenders in the market place, stating that it would be worth investigating further into this.

6.3 The Norfolk Schools Forum **RESOLVED** to **NOTE** the discussion

7. Norfolk Schools Forum Forward Work Plan

7.1 Officers introduced the current forward work plan to the Forum.

7.2 The following items were scheduled for the July 2024 meeting of the Schools Forum.

- LFI strategic planning
- Financing Schools scheme
- DSG consultation preparation
- Internal audit update.

7.3 The following point was raised and discussed:

- Forum Members suggested that a summary of the Schools Forums actions across the 2023/24 civic year may be prudent. This was **agreed** by Officers.

7.4 The Norfolk Schools Forum **RESOLVED** to **NOTE** the forward work plan.

8. Any Other Business

8.1 No other business.

The meeting closed at 12:17

Date of Next Meeting: Wednesday 10 July 2024 at 9am, to be held in the Cranworth Room, County Hall

**Martin White, Chair
Norfolk Schools Forum**



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