

# Norfolk Schools Forum

## Minutes of the Meeting held on Friday 6 December at 9am, Cranworth Room, County Hall,

<b>Present</b>	<b>Organisation</b>	<b>Representing</b>
Martin White (Chair)	Nebula Federation	Maintained Primary Governors
Stephen Beeson	Norwich Diocesan Board of Education	Church Representative
Steven Dewing	Sapientia Education Trust	Academies
Lacey Douglass	Freelance Early Years Advisor	Early Years Representative
Mike Grimble	Avenue Junior School	Maintained Primary Governors
Bob Groome	National Education Union	Joint Consultative Committee
Glyn Hambling	Unity Education Trust	Alternative Provision Representative
Carole Jacques	Earlham Nursery School	Maintained Nursery Schools
Joanne Philpott	Ormiston Academy Trust	Academies
Sarah Porter	Unity Schools Partnership	Academies
Rachel Quick	The Wherry School	Special School Academy
Sarah Shirras	St. Williams Primary School	Maintained Primary Schools
Matthew Smith	Sheringham Woodfields School	Maintained Special Schools
Joanna Tuttle	Aylsham High School	Maintained Secondary Schools
Adrian Lincoln	NASUWT	Joint Consultative Committee

<b>Also Present</b>	<b>Title</b>
Martin Brock	Accountant – Schools, SEN, and Early Years
Maisie Coldman	Committee Officer, Democratic Services
John Crowley	Assistant Director - Intelligence and Education Sufficiency
Dawn Filtness	DSG Strategic Lead
Samantha Fletcher	Assistant Director – Education Infrastructure and Partnerships
Jane Hayman	Assistant Director – Sufficiency, Planning and Education Strategy
Megan Hughes	Trainee Committee Officer, Democratic Services
James Wilson	Director for Sufficiency Planning and Education Strategy
Jonathan Nice	Senior Advisor, Teaching and Learning
Michael Bateman	Assistant Director- SEND Strategic Improvement and Early Effectiveness

### 1. Welcome from the Chair

### 2. Apologies and substitutions

- 1.1 Apologies were received from Vicky Warnes, who was substituted by Adrian Lincoln. Forum Members were also informed that Glyn Hambling and Rachel Quick would be joining the meeting later.

### 3. Minutes

- 3.1 The minutes of the meeting held on Tuesday 19 November 2024 were approved as an accurate record of proceedings.

### 4. Matters Arising

- 4.1 **Summary of Actions from November 2024 Schools Forum**

- 4.1.1 The Chair asked for an update on minutes item 2.2 regarding a replacement Maintained Primary Representative and asked for clarification on what would happen if there was more than one nomination. Officers confirmed that an email would be going out to all headteachers and governing bodies inviting nominations and a form to complete to express interest. If more than one nomination was received, an election process would be carried out through a survey mechanism.
- 4.1.2 It was suggested by Officers that the most reliable method to ask for nominations would be to go through school offices, as there can never be complete certainty in having a full list of governors. It was also suggested that the request should be highlighted through the eCourier. The Chair acknowledged that this process had not been implemented previously and emphasised the need for the Norfolk Governors Network and NSLA to be made aware of the new procedure.
- 4.1.3 The Chair queried the timescale for electing a new representative. Officers confirmed the process would be completed before the January meeting. A Forum Member enquired into the fulfilment of the academy position, with officers clarifying that they had four applications meaning an election would occur. It was suggested highlighting the meeting date to new representatives, which officers confirmed would be communicated.
- 4.1.4 The Chair asked about how the voting procedures would work in the case of an election. Officers explained that Primary Maintained Schools had one vote from the headteacher and one from the governing body, with one vote per unit in federations. Officers **agreed** to ensure this was clearly communicated and to provide a paper on the formal appointment procedure.
- 4.1.5 With reference to minute item 5.9, bullet point 23, officers noted that following the November meeting, discussions had focused on the methodology for the additional grant. It was found that allocating funds solely to teacher-led nurseries was impractical, as there were no longer quality supplements as part of Norfolk's funding formulae and so the data was not held. Providing the funding to just teacher-led now would be considered risky, as it would be removed in April when funding was rolled into the base rate. A Forum Member raised concern on the use of the phrase 'quality supplement' as it inferred judgement towards quality and that the grant was specifically about teachers' pay. Officers explained that if additional funding had been included in the formula for teacher-run provisions, it would have been considered a quality supplement, as per the allowable elements of the funding formula. There was no methodology for future distribution without a quality supplement, and officers had received no indication that there was a desire in Norfolk for it to be reintroduced. The Chair and Forum Members acknowledged the challenges but expressed concerns over language to prevent misunderstanding.
- 4.1.6 Officers encouraged relevant School Forum Members to join the Early Years Consultative Group. The Chair requested a report on the makeup of the committee for the next meeting.
- 4.1.7 The Chair asked for an update on minute item 7.9 bullet point 7. Officers confirmed this had now been resolved and the agreed application was being submitted to Department of Education (DfE)
- 4.1.8 During the discussion on minute item 12.1, the Chair sought clarification on the response provided. It was confirmed by officers that the issue with the organisation of the May 2025 meeting date was due to it occurring post-election, resulting in the Cranworth room not being available. Two alternative dates were considered, but it was ultimately decided that the meeting could proceed as a room in the Archive Centre would be available, although finalisation was still pending.
- 4.2 Update on Schools Block to High Needs Block Transfer
- Officers noted no substantive updates.

## 5. Strategic Planning (including Local First Inclusion)

### 5.1 Officers provided a verbal update

- Officers noted no substantive updates but highlighted that discussions with the DfE were effectively paused until a meeting with DfE Officials held on the 17 December in London, following the plan submitted in October. The meeting was expected to provide insights into national SEND reforms, with announcements anticipated in the spring. Officers expected further updates in the new year and emphasised the importance of contributing to the national debate.
- Officers noted the recent government funding announcements, noting a mention of statutory override, with an update expected this month on its extension. It was noted that the current Safety Valve deal remained ongoing.

### 5.2 The Norfolk Schools Forum **RESOLVED** to **NOTE** the update.

## 6. Provisional DSG Allocations for 2025/26

### 6.1 Officers introduced the annexed report (6), which set out indicative levels of Dedicated Schools Grant (DSG) funding for 2025-26 as published in the DfE's National Funding Formula provisional allocations.

### 6.2 The following key elements were highlighted to the Schools Forum:

- It was highlighted that the usual provision of National Funding Formula allocations were expected from the DfE in July, however this did not occur this year. The current provisional national formula allocations were only published online by the DfE on the 28 November 2024. This delay had impacted on the ability to provide consultation papers. The actual DSG allocations, based on the October 2024 census, was expected within the next few weeks.
- An overview was provided of the overall DSG allocation, which currently stood at just over £841 million, excluding the Early Years Block, growth funding, and falling rolls funding.
- It was explained that the Minimum Fund Guarantee (MFG) for 2025/26 would be set within the allowable range of -0.5% to 0%. Officers indicated a preference to set the MFG at the highest level of 0% to ensure per-pupil protection for all schools through the local formula.

### 6.3 The following points were raised and discussed:

- A Forum Member queried why the Local Authority (LA) would decide the MFG level in a way that could detract from main entitlements and fail to mirror the National Funding Formula. The importance of adhering to the National Funding Formula was emphasised by the Forum Member, as deviations could make funding less transparent for schools. Officers explained that the decision had rested with the LA to set the MFG following engagement with Schools Forum, but previous engagement had supported providing maximum protection for schools and to ensure smoothing. Officers noted that this year the information will be received late, which limited the time available for broader discussions/modelling.
- Officers explained that historically the LA had always opted for the maximum allowable amount to provide the highest level of protection for schools. This year, the top of the

range is 0.5% (being lowered by DfE to 0% for 25-26), and it had been assumed that the same approach would be applied. However, officers noted that they did not currently have the data or modelling capabilities to fully understand the potential impacts of different options.

- Forum Members agreed with the proposal that the MFG should be set at 0%, but could be subject to consultation for future years.
- A Forum Member expressed concern that pay awards would remain largely unfunded under the current formula, with increases of less than 1% once grants were accounted for, offering no coverage for inflation. It was highlighted that with the addition of certain issues such as falling rolls and insufficient funding, this would impact schools significantly. Officers acknowledged that the funding increase had been lower than the usual 2 to 3% seen in the National Funding Formula and noted that they would have to wait to see if any new grants were introduced.

6.4 The Norfolk Schools Forum **RESOLVED** to **CONSIDER** and **COMMENT** on the changes to the DfE's National Funding Formula and the increase in overall DSG funding for 2025-26, including previously separate grants which were to be rolled into the DSG from April 2025.

**The meeting broke at 10:03 and reconvened at 10:14. Rachel Quick arrived to the meeting during this break.**

## **7 Notional SEN Allocation Methodology**

7.1 Officers introduced the report, which summarised Norfolk's Notional SEN budget methodology compared to local and statistical neighbours, as well as the DfE recommended approach. The report proposed amending Norfolk's methodology to align with the DfE recommended approach from April 2025.

7.2 The following key elements were highlighted to the Schools Forum:

- Feedback from the Schools Forum consultation revealed mixed opinions on whether to adopt the DfE recommended approach or retain the previous methodology. However, at November's Schools Forum meeting, it was agreed that possible alternative methodologies that aligned more closely with the DfE approach should be considered at this meeting.
- The methodologies of Suffolk, Cambridgeshire, and Lincolnshire were examined, along with Cornwall and the authorities that previously formed Cumbria, who are strong performing statistical neighbours, including having healthier High Needs Block positions. When comparing this year to the previous year, it was observed that their percentage allocations of the Schools Block to Notional SEN were significantly higher, with the exception of Cambridgeshire, depending on their final decision on their level of Notional SEN proportion for 2025/26. It was also highlighted that, even if the authorities appeared to be following the DfE recommended approach, the outcomes differed, which made it difficult to draw conclusions.
- It was explained that a focus was on considering what a future formula might look like, increasing Norfolk's formula to reach the national average of 12%.
- Three options were presented to Forum Members: the illustrative methodology from the DSG consultation and two alternatives. Option 1, as outlined in the DSG consultation technical paper, did not include Free School Meals eligibility (FSM) factors within deprivation indicators or any part of the lump sum. Option 2 was similar

to Option 1 but included FSM and FSM within the past six years (FSM6) as deprivation factors alongside Income Deprivation Affecting Children Index (IDACI), with the lump sum factor also included. Option 3 followed a similar approach but placed greater emphasis on deprivation, with a corresponding reduction in low prior attainment and with the weightings were designed to approximate those in Section 4.2 for a Notional SEN budget of 12% of the budget share.

- Advantages and disadvantages were identified, with Option 3 being considered the most balanced approach, being more closely aligned with the DfE recommended approach and it had addressed differing views whilst minimizing negative impacts. However, it was noted that some schools would see significant differences which would require further discussions on how to support them.

### 7.3 The following points were raised and discussed:

- A Forum Member asked why officers had chosen to use the IDACI deprivation factor rather than Education Acorn which has been discussed in the past. Officers explained that Education Acorn was not an allowable deprivation factor within the National Funding formula, that IDACI had been chosen historically based on analysis work and agreement of a sub-group of Schools Forum, and that IDACI/FSM/FSM6 are now the only allowable options within the formula. Neighbouring authority methodologies had been evaluated, in the hope of aligning more closely with their approaches. A very wide range of methodologies exist, with no common approach.
- The Chair enquired into how prior attainment was measured. Officers explained that for primary schools, low prior attainment schools attract funding where pupils did not reach a good level of development in the Early Years Foundation Stage. For secondary schools, funding was allocated to pupils who had not achieve the expected level at Key Stage 2 in reading, writing, or maths.
- The Chair expressed a personal preference for FSM over IDACI, particularly due to the number of children moving into small schools, which are often seen as attractive for this reason.
- A Forum Member raised concerns about the use of FSM, suggesting that it had felt like double funding this group of pupils.
- Officers clarified that FSM 6, which included children who have been eligible for FSM within the last six years, captured a wider group of children and it included those at a lower level of deprivation, who may be in and out of FSM eligibility
- The Chair stated that if a deprivation factor was to be included, there should be a shift towards FSM or FSM 6 rather than IDACI, due to the specific nature of Norfolk's schools and the mobility of parents moving children across school catchment areas.
- Officers clarified for Forum Members that IDACI used individual pupil's broad postcode areas, which could include both pockets of deprivation and wealth, and therefore might not reflect the individual pupil's situation. They gave an example of a rural coastal area where housing was spread out which made IDACI an unreliable indicator of deprivation for those schools.
- A Forum Member expressed a preference for FSM 6. Officers commented that if the aim had been to maintain the same split between low prior attainment and deprivation, it would have been possible to exclude free school meals and still

achieve a similar overall effect by using only FSM 6. However, it was noted that approximately 43.5% of the funding would have been allocated using FSM 6 to achieve the same result, assuming all other calculations remained the same. Officers added that multiple versions could have been modelled, and further work could be done to refine the approach with feedback being taken into account.

- Forum Members unanimously **agreed** that Option 3 was the best approach.

### **Glyn Hambling arrived to the meeting at 10:28 am**

7.4 The Norfolk Schools Forum **RESOLVED** to **RECOMMEND** the proposal to amend the methodology for the calculation of Notional SEN allocations to the principles of option 3.

## **8 Element 3**

8.1 Officers introduced the report, which provided the proposal from the Local Authority (LA) for the Element 3 arrangements for 2025-26 Dedicated Schools Grant (DSG) financial year.

8.2 The following key elements were highlighted to the Schools Forum:

- Officers introduced the extensive work contributed to by the Local First Inclusion Reference Group, DSG consultation and other engagement, with shared agreement on the need for change. Although there were multiple elements with individual advantages and disadvantages, and without complete consensus on every sub element, it was emphasised that the proposed approach attempted to find an overall solution.
- Officers highlighted the key principles found in section five, such as transparency, clarity, flexibility, and collaboration, emphasising that funds should be directed to their intended purpose, particularly for children with high needs.
- The proposal suggested extending the current arrangements into the summer term, acknowledging that a small number of schools were facing challenges with the existing funding structure. These issues were being discussed, and the Unexpected Situation Support Fund could be used to address these unique cases. The new approach would begin in the new academic year.
- Officers would continue to work collaboratively, sharing updates and effectively communicating to ensure the right approach was adopted for long-term success.
- Officers planned to send out a message in the coming week informing stakeholders of further detail of this approach in January.

8.3 The following points were raised and discussed:

- Forum Members expressed their support for the paper, acknowledging the significant effort that went into it. They felt it effectively captured all the discussions, presenting them in a balanced and nuanced manner. While they noted that there were areas for improvement, they recognised the considerable investment in the paper.
- A Forum Member raised concern about the wording of the key principle, "a mechanism to recoup funding that is not used appropriately." Officers clarified that this referred to cases where funding allocated to certain sectors becomes redundant and it would go into a school's pot and therefore be substituting other pressures on a school's budget. Officers stated that this responded to concerns raised by some schools, and that there

was also concern that not all schools were aware of the expectations, and so it was up to the Local Authority to make clear what they were, as well as having a mechanism in place to help with those cases.

- A Forum Member queried whether the proposal meant that Enhanced SEND Provisions (ESPs) would be discontinued, noting the similarity to their current structure. Officers clarified that they were not aiming to eliminate ESPs.
- A Forum Member expressed concern about the vagueness in the report, particularly regarding the use of the word "preferably" in reference to the INDES model on page 14. It was emphasised that clear communication was crucial to ensure stakeholders understood what would change. Officers explained that while the INDES model was preferred, the DfE had made it clear that it could not be required, but similar information and plans for each child would still be required. Plans were shared to present material to the Local Inclusion Partnership for formal endorsement and engage with every school in Norfolk to discuss the best and most efficient ways to meet needs.
- The Chair asked how officers were looking to use ESPs. Officers explained that ESPs, as a teacher-led model, could still fit within the framework, and could be part funded by the formulaic model.
- A Forum Member emphasised the importance of clearly communicating the adoption of the model, explaining why it was adopted, and ensuring consistency in the communication with schools.
- A Forum Member further stressed the need for a clearer process and suggested the inclusion of an appeals processes.
- A Forum Member highlighted that ESPs were a decision for schools to choose and emphasised the need to be transparent about this if it was the case. The Chair noted that this approach would give power to schools and promote collaboration.
- Officers noted that a test and learn approach would be necessary in the first academic year. He mentioned that the government was signalling rapid changes to SEND reforms and highlighted that schools would need to become self-sufficient. However, it was highlighted that it would not align with national developments until September 2026.
- A Forum Member asked what measurable success would look like from a local authority perspective. Officers responded that the goal was to direct funding to where there was a clear need and ensure it supports the right kind of interventions, something that had not always been achieved in the past. It was added that schools could work with the Local Authority to accomplish this.
- A Forum Member queried when schools could expect the funding, whether as a block or throughout the year. Officers clarified that payments would be made on a termly basis, with amendments occurring during that time. They explained that DfE guidance suggested monthly payments but noted that this would involve significant administration. The termly approach was seen as a more reasonable balance, and a clear timeline would be provided for when payments could be expected.
- A Forum Member asked whether money would be recouped if one child from a cohort had left, or if the whole cohort would be reevaluated. Officers explained that one child leaving may not affect the whole school provision and highlighted that the dialogue with schools would be integral.
- A Forum Member shared apprehension about the speed of implementation, highlighting the need for a robust plan by September to ensure equitable funding allocation. They were concerned that continuing the rollover model into summer could perpetuate inequalities, with some schools benefiting more. If implementation couldn't happen by September, the Forum Member expressed discomfort with continuing the same model, especially given funding challenges. Officers explained that if a block transfer did not

occur, it could affect the summer term. However, from September onwards, the formulaic element would no longer be in place. They noted the need to find a solution for the summer term if that happened and acknowledged that the first implementation might not be perfect, with ongoing adjustments and a focus on listening and correcting as needed.

- A Forum Member expressed concern about the predictability and clarity of funding, highlighting the risk that the local authority could end up chasing funding around. It was suggested to simplify the process by stating that termly changes would be made. Officers commented that their aim was to provide clarity, noting that regular school meetings were ongoing, and that information should naturally arise from these discussions. They emphasised that for September 2025, schools would be responsible for submitting information by the deadline to ensure timely processing. It was acknowledged that there was a need to ensure that schools were aware of the deadline and explained that staff from various areas would be involved to help maintain consistency and prepare for this process.
- A Forum Member asked for clarification on the 1% transfer, specifically whether it was needed for this year and what the position would be in future years. Officers responded that, from a local authority perspective, they would be raising with the DfE on 17 December meeting that the LA would like to move away from a block transfer, but that support from the DfE for this approach was needed. They added that the situation would be reviewed for 2026/27, explaining that the reason for matching the formulaic element and block transfer was to assess the funding position at that time.
- The Chair emphasised that the guidelines to be issued in January needed to be very clear, suggesting that anything that could be presented diagrammatically should be included. Officers responded that a communication plan would be developed soon, and the feedback would be taken onboard.
- The Chair voiced was pleased that all comments had been taken onboard with the creation of this paper and all Forum Members **agreed** to support this document.

8.4 The Norfolk Schools Forum **RESOLVED** to **CONSIDER** and **COMMENT** upon the LA proposal for the revised Element 3 funding model for Norfolk for the 2025-26 DSG financial year.

**The meeting broke at 11:40 and reconvened at 11:49.**

## **9 Schools Forum Identity**

9.1 Officers provided a verbal update

9.2 The following points were raised and discussed:

- Officers suggested having a forum email address accessible to all members with some Forum Members having emphasised the need for a clear separation between the Local Authority and the Schools Forum. However, this was not agreed by all Forum Members as some felt that email correspondence was not regular enough to warrant one.
- A discussion took place between officers and Forum Members regarding the use of identity on a letterhead. Forum Members agreed that having something to distinguish themselves would be beneficial. Officers **agreed** to look into this and to discuss further with the Chair.

9.3 The Norfolk Schools Forum **RESOLVED** to **NOTE** the update.



## 10 Schools Forum Substitutes

10.1 Officers provided a verbal update

10.2 The following points were raised and discussed:

- The Chair queried the possibility of having a mechanism where the Committee Officer maintained an up-to-date list of substitutes.
- Officers noted that with upcoming nominations for representatives, there may be more people putting themselves forward than there are roles, presenting a good opportunity to arrange substitutes.
- A Forum Member asked if substitutes for one body could cover for other substitutes if also representing the other body. Officers responded that this could happen.
- A Forum Member stated that it should be the Forum Members' responsibility to arrange their own substitute. Officers raised concerns about examples in the past where this had been the case but it had not worked due to substitutes not fully understanding they were representing a sector rather than their own organisation.
- Officers **agreed** to prepare a paper on the substitute process and bring it back to the Forum.
- A Forum Member suggested training for substitutes, particularly on the remit of the Schools Forum, which officers **agreed** would be addressed.

10.3 The Norfolk Schools Forum **RESOLVED** to **NOTE** the update.

## 11 Norfolk Schools Forum Forward Work Plan

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

11.2 The following items were scheduled for the January 2025 meeting of the Schools Forum:

- Election of Chair and Vice-Chair for 2025
- Review of Schools Forum Membership
- Strategic Planning (inc. Local First Inclusion)
- Proposed DSG Budget and 2025/26 DSG Allocations
- Pupil Variations 2025/26

The following points were raised and discussed:

- A Forum Member sought clarification on the decisions made regarding the 1% transfer, referencing the November minutes, which indicated it would be reviewed in December. Officers responded that there was no new information at the time but would provide an update once available. They noted that, pending a decision from the Secretary of State, there could be an exceptional meeting before the scheduled January meeting. However, it was confirmed that clarity would likely come in January, with updates from the December 17 meeting shared with the forum.
- The Chair mentioned that those wishing to be considered for the roles of Chair and Vice-Chair should express their interest to officers.

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

## **12. Any Other Business**

- 12.1 The Chair highlighted this meeting as Mike Grimble's last meeting, acknowledging his two decades of dedicated service and commitment. All Forum Members and officers wished him the best for his retirement.

## **13. Date of Next Meeting**

- 13.1 The next meeting of the Norfolk Schools Forum was confirmed for Friday 31 January 2025, to take place at 9am in the Green Room, The Archive Centre, County Hall.

**There being no other business, the meeting closed at 12:16**

Martin White, Chair  
Norfolk Schools Forum



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