

# Norfolk Schools Forum Minutes

## Minutes of the Meeting held on Friday 31 January 2025 at 9am, Green Room, Archive Centre, County Hall

### Present

Martin White (Chair)  
Stephen Beeson  
Martin Colbourne  
Lacey Douglass  
Glyn Hambling  
Carole Jacques  
Owen Jenkins  
Joanne Philpott  
Sarah Porter  
Rachel Quick  
Matthew Smith  
Joanna Tuttle

### Organisation

Nebula Federation  
Norwich Diocesan Board of Education  
City College Norwich  
Freelance Early Years Advisor  
Unity Education Trust  
Earlham Nursery School  
Broad Horizons Education Trust  
Ormiston Academy Trust  
Unity Schools Partnership  
The Wherry School  
Sheringham Woodfields School  
Aylsham High School

### Representing

Maintained Primary Governors  
Church Representative  
16-19 Representative  
Early Years Representative  
Alternative Provision Representative  
Maintained Nursery Schools  
Academies  
Academies  
Academies  
Special School Academy  
Maintained Special Schools  
Maintained Secondary Schools

### Substitute Members Present

Louise Clements McLeod  
Adrian Lincoln

### Organisation

Halcyon Federation  
NASUWT

### Representing

Maintained Primary Schools  
Joint Consultative Committee

### Also Present

Martin Brock  
John Crowley  
Dawn Filtness  
Samantha Fletcher  
Jen Harris  
Jane Hayman  
Jonathan Nice  
Nicki Rider  
Laine Tisdall  
Alison Toombs

### Title

Accountant – Schools, SEN, and Early Years  
Assistant Director – Intelligence and Education Sufficiency  
Dedicated Schools Grant Strategic Lead  
Assistant Director – Education Strategy  
Senior Communications Officer (Children's Services)  
Director – SEND and Inclusion  
Senior Advisor  
Assistant Director – SEN, Alternative Provision and Sufficiency  
Committee Officer, Democratic Services  
Senior Advisor – Inclusion

## 1. Election of Chair and Vice-Chair for 2025

- 1.1 Martin White indicated that he was happy to continue as Chair of the Norfolk Schools Forum.
- 1.2 There being no other nominations, Martin White was duly elected Chair of the Norfolk Schools Forum for 2025.
- 1.3 Glyn Hambling indicated that he was happy to continue as Vice-Chair of the Norfolk Schools Forum.
- 1.4 There being no other nominations, Glyn Hambling was duly elected Vice-Chair of the Norfolk Schools Forum for 2025.

## **2. Welcome from the Chair**

- 2.1 The Chair welcomed Forum Members, Substitute Members and officers to the meeting.
- 2.2 The Chair welcomed Owen Jenkins, as this was his first meeting as a Member of the Norfolk Schools Forum

## **3. Apologies and substitutions**

- 3.1 Apologies were received from Vicky Warnes (substituted by Adrian Lincoln), Bob Groome (also substituted by Adrian Lincoln), Sarah Shirras (substituted by Louise Clements McLeod), Steven Dewing, Adrian Ball, Daniel Thrower, Peter Pazitka, Stuart Allen, James Wilson, Michael Bateman, and Sara Tough OBE.

## **4. Minutes**

- 4.1 The minutes of the meeting held on Friday 6 December 2024 were approved as an accurate record of proceedings.

## **5. Matters Arising**

- 5.1 A review of the Norfolk Schools Forum constitution was imminent with a report scheduled for consideration the March 2025 meeting. Input from Forum Members during the review would be welcomed.

## **6. Strategic Planning (including Local First Inclusion)**

- 6.1 Officers introduced the report, which outlined the range of projects and work across the Local First Inclusion (LFI) programme, alongside an update regarding the ongoing discussions with the Department for Education (DfE) relating to the revised safety valve plan.
- 6.2 The following key elements were highlighted to the Schools Forum:
  - There had been no further news from the DfE regarding the revised safety valve submission, with officers chasing for an update. There had been positive dialogue with the DfE regarding other topics, however this was not specifically related to LFI.
  - Communications relating to the Special Educational Needs and Disabilities (SEND) and Inclusion Support Model were sent out to various stakeholders. The rollout of Zone Inclusion Partnerships (ZIPs) in the King's Lynn and Norwich areas had commenced and was progressing.
  - The SEND and Inclusion Support Line was established in September 2024. The first quarterly dataset was now available, illustrating an encouraging usage trend. Approximately 2,000 calls were received since the establishment of the line, equating to 23 calls per day on average.
  - Communications relating to the Educational Psychology & Specialist Support (EPSS) service were sent out to stakeholders in the past week. Follow-up webinars were scheduled in February 2025.
  - A response was still awaited from the DfE regarding the capital bids for two new special schools Norfolk.

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

- Forum Members noted that while considerable work was taking place regarding the LFI, there was uncertainty within the education sector as to when and where the impact of the changes would be felt. Officers **AGREED** to provide a stronger reflection on key performance indicators and timeline of expected impact in future reports to the Schools Forum.
- A Forum Member queried if the Local Authority could assume the DfE's likely view of the safety valve submission, given the lack of updates from the government. An officer stated this was difficult to quantify. There had been enquiries from the DfE as to whether the block transfer decision would be reconsidered on the Schools Forum agenda for this meeting, with officers responding to state this was not the case. No further response had been received to date. It was noted that a survey for the Society of County Treasurers was recently completed by the Local Authority. The questions within the survey appeared to imply that other local authorities which were in the safety valve programme had received responses from the DfE regarding their submissions. A meeting was held with the Director General of Schools, Juliet Chuba CB, prior to Christmas 2024. There were positive discussions on various topics in this meeting, however, the Director General could not be drawn on their views regarding the safety valve submission and expectations in this area.
- The Chair asked if the Local Authority was chasing the DfE to confirm when the likely timeline for a safety valve decision would be made. Officers confirmed that the Executive Director of Children's Services wrote a letter to the DfE the previous week, raising concerns regarding the lack of updates on both the safety valve submission and the special school capital bids. While the special schools had been approved in principle by the DfE, the formal decision to proceed was being delayed.
- The Chair queried if there was a connection between the lack of updates from the DfE and the likelihood of local government reorganisation. Officers stated their belief that the two incidences were not connected. The Local Government Association (LGA) had recently held conversations with the Treasury to raise awareness of safety valve deficits across the country. There was no indication that decisions were being delayed due to local government reorganisation. However, there was a sense that the Treasury were interested in changing the trajectory of block transfers and the Dedicated Schools Grant (DSG).
- Forum Members noted it was reassuring to see timescales for the rollout of Phase 2 and Phase 3 of the ZIP schemes, however, the proposed six-week period appeared challenging from an organisation point of view. It was queried as to what communications had been sent out to schools regarding meetings for the ZIP rollout. An officer confirmed that dates for Phase 2 had been finalised and **AGREED** to follow up the communications behind this.
- The Chair expressed concern that ZIP meetings would require schools to send both their headteacher and Special Educational Needs and Disabilities Coordinator (SENDCO) to attend, as this would prove difficult for many establishments. There was a need to consider the cost implication of such a move, in addition to the impact on educational quality. Officers acknowledged that at some schools, the headteacher also held the SENDCO role. The ideal situation was that both would be represented at the termly ZIP meetings. The Chair commented that this setup could mean that some schools were only partially represented or not able to participate at all. Officers stated that attendance at the ZIP meetings would be monitored, as it was paramount that all sectors were included in the conversation.

- A Forum Member expressed concern regarding a disconnect between what was perceived to be occurring through the ZIPs and the actual reality at ground level. There was a perception that a significant proportion of LFI activities were rooted in ZIP schemes, which had the knock-on effect of making the Local Authority unaware of actual engagement levels in the sector, with certain parts missing out entirely.
- The Vice-Chair requested officers to reconsider and reflect upon the ZIP meeting schedule, given the compressed timeline to organise attendance which had put pressure on the sector. Some schools and trusts would find it difficult to release their headteacher and SENDCO at the same time to attend such meetings. Officers stated that while any further delays to the rollout would affect the potential success of the scheme, they were happy to take feedback on board from the Schools Forum to reflect upon the ZIPs.
- A Forum Member noted that while the education sector was waiting with anticipation regarding the ZIP rollout, the attendance of such meetings would be dependent on the quality of discussions and material provided, which would show attendees that their contributions were making a difference in their communities. For the ZIP scheme to succeed, there was a need to connect its work effectively with the LGA's consultation on SEND and the national picture of long-term reform. It was acknowledged that this would be challenging but was achievable. Officers stated they were aware that a White Paper was expected from the government on SEND reform, which would then be reflected upon by the Local Authority to plan accordingly. To create a high-quality ZIP meeting, there was a need to consider the different perspectives of the attendees, to create a strong working relationship.
- A Forum Member stated that for the ZIP to be successful, there was a need to utilise learning from past projects. The Communities Teams had proven successful in improving outcomes in several areas of Norfolk, however, in other areas of the county the impact was substantially lower. Quality assurance needed to be considered across the entire county, with a mechanism to ensure feedback was taken on board and acted upon.
- Following a suggestion from the Vice-Chair, officers **AGREED** to provide a summary of comments on this item to the LFI Executive Group at their future meeting.

6.4 The Norfolk Schools Forum **RESOLVED** to **COMMENT, SUPPORT** and **CHALLENGE** summary information provided regarding implementation plans for Zone working and planned changes to the EPSS operating model.

## 7. Proposed Schools Budget 2025-26

7.1 Officers introduced the report, which provide updated information related to the DSG, which was now available from the DfE.

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

- Following discussions at the November 2024 meeting of the Schools Forum, the disapplication request to the DfE regarding the block transfer was revised downwards from 1.5% to 1.43%, at a total of £9.7m.
- The DfE had now published the 2025-26 DSG allocations and related guidance. Within this publication there was confirmation of an increase to Early Years funding rates, approval of individual school adjustment disapplication requests, and the conducting of the Autumn 2024 Early Years census. In addition, the DfE issued the Authority Proforma Tool (APT), which the Local Authority submitted back to the DfE on Wednesday 22 January 2025.

- Overall core school funding nationally totalled £63.9 billion for 2025-26, compared to £61.6 billion in 2024-25. This figure included an increase in High Needs funding, bringing this total to £11.9bn nationally.
- Norfolk's DSG allocation for 2025-26 was £940m before academy recoupment, an increase of approximately £86m on 2024-25's figures. However, it was important to note that this increase included around £47m worth of grants which were rolled into the overall figures.
- The DfE confirmed that the National Funding Formula (NFF) was increasing by 2.23% per pupil on average in 2025-26.
- A decision from the DfE was still awaiting regarding the block transfer between the Schools Block to the High Needs Block. If this was approved, the Schools Block DSG would reduce by £9.7m and vice versa.
- At present, Norfolk had an outstanding £80m DSG deficit, resulting from pressures in the High Needs Block. A deficit of approximately £62m was forecast for the end of the 2024-25 financial year. If £10m in safety valve funding was received before the 31 March 2025, this would leave Norfolk with a forecast deficit of £128m for 2025-26.
- It was noted that certain grants such as the Teachers Pay Additional Grant (TPAG), Teachers Pension Employer Contribution Grant (TPECG) and Core Schools Budget Grant (CSBG) would cease to exist as separate grants, being rolled into mainstream schools' NFF from 2025-26. However, it was confirmed that High Needs grants would remain separate for the time being.
- The Chancellor of the Exchequer set out changes to Employer National Insurance contributions for 2025-26 in the Budget, also announcing that additional funding would be provided to cover the costs of the change. No figures were known at present.
- A £70m deficit in the High Needs Block was forecast for 2025-26.
- There was a £43m increase in Schools Block funding for 2025-26 compared to the 2024-25 figures. However, it was stressed that this represented a decrease in real terms, due to a reduction of pupils in the school system in Norfolk.
- De-delegation rates had now been set for 2025-26 based on the final pupil numbers from the APT. The only change was to the free school meals eligibility rate, to ensure that approximately £31,500 was in hand to cover this.
- The Early Year Block had seen a large increase in funding from £72m in 2024-25 to £103m for 2025-26. The reason behind the increase was due to additional entitlement for working parents from September 2025, from 15 hours per week to 30 hours.
- Approximately £3.5m was left in the Central Services Schools Block for 2025-26, once line-by-line item deductions were taken into account.

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

- A Forum Member welcomed the Schools Block allocations and queried if the imminent technical paper would include the formulaic Element 3 funding from the High Needs Block. These figures were required soon for schools to plan their 2025-26 budgets. Officers confirmed that the technical paper was due to be published later today, based on the APT. The provisional Element 3 formula from September 2025 onwards was expected to be published in early February, alongside the Element 3 allocations for 2025-26.

- Forum Members stated that it was important that communications emphasised the contents of the technical paper and set out a provisional timeline of the additional Element 3 information. Schools were experiencing pressures across different teams towards setting their 2025-26 budgets, given staffing costs, unknown SEND funding, and the need to ensure a balanced budget. Communications needed to provide clarity on the situation, with clear diagrams and bullet points.
- A Forum Member expressed concern regarding the lack of presence of the Schools Finance Consultative Group, as previously this had provided clarity on various budget issues. An officer **AGREED** that the terms of the Group needed to be reconsidered, to potentially look at a different model.
- A Forum Member expressed concern regarding a significant increase in independent school funding within the High Needs Block, from £44m in 2024-25 to £61m in 2025-26. This figure was almost as much as the combined funding for maintained academies, special schools and free schools. Given the aim to reduce usage of the independent sector in LFI, concern was expressed that the trend curve would not be flattened by March 2026, let alone declining.
- The Chair requested further information regarding the £39.5m deficit in the High Needs Block figures for 2024-25. Officers confirmed this figure was the budgeted deficit. The forecasted £70m deficit for 2025-26 was comprised largely through an increase in independent schools places and significant growth in children not on a school roll. A similar level of growth in independent school places was assumed for 2025-26 compared to the current year. There had been an increase in appeals being lodged for independent schools; however, the numbers remained relatively low. A factor affecting the growth in places was through the recent establishment of new independent schools in Norfolk. Officers were not seeing a reduction in demand for special school placements at present.
- Forum Members requested variances to be shown in the block tables for future years, as this assisted with presentation of the figures and emphasising what changes had been made.
- A Forum Member expressed concern regarding the cumulative DSG deficit of £186m, and the implications it had on the Local Authority's strategic direction. It was further queried as to what constitutional responsibilities the Schools Forum had at its disposal towards the DSG deficit. An officer commented that the strategic approach taken for 2024-25 was to take a realistic view of the current market patterns, as previous forecasts had been too optimistic. It was stressed that the figures did not stress that the Local Authority wished to spend £60m on independent school places. The 2025-26 budget was being set in accordance with the funding available. Clarity was still required from the DfE to finalise the High Needs Block situation. Officers were attempting to identify risks based on learned experience from prior years. It was noted that an emerging issue could be independent schools reaching saturation point. The Local Authority did not want to encourage expansion of the market, as the ultimate aim was to reduce reliance on this sector. Lobbying of the DfE to find longer-term solutions would continue. As other local authorities were in the same position as Norfolk, the LGA were working to flag the current risky situation with the DfE.
- The Chair requested clarity regarding the statutory override function. An officer explained this was an accounting function, where the Local Authority did not need to take the cumulative DSG deficit into account when considering the sufficiency of its reserves. However, this function was due to cease by the end of March 2026, with a DfE announcement forthcoming, likely to be tied alongside SEND reform. It was paramount that the scale of the risks around the 2025-26 deficit were known, as it was beginning to impact the Local Authority's cashflow. Even if the statutory override was given a temporary reprieve, a tipping point where the Local Authority could no longer fund the DSG was coming into view, possibly as early as 2026-27. It was stressed that Norfolk was not in a unique situation, as other local authorities were experiencing the same issues.

- A Forum Member asked if there were any predictions as to where the figures for independent schools would be in 12 months' time, as there were budget implications to be considered. An officer noted that the independent sector was at saturation point a couple of years previously. However, the independent sector had the ability to grow at a much faster rate than the state sector. The £61m figure for independent schools in 2025-26 had significant growth assumptions built into the equations, based on similar growth seen in 2024-25. Alternative Provision (AP) growth was predicated on the AP bases and work being conducted in this sector, with this being considered as part of the independent figures. It was stated that predicating the figures for children not on a school roll was challenging. An element of growth was assumed; however this took into account scarcity; that there was a finite number of children within the school system. Falling rolls was an area where conversations were required across the system.
- The Vice-Chair commented that the timescale from the present day and the modelling required for 2026-27 was relatively short. There was a need to understand how growth and modelling was trending during 2025, to build confidence for future years. It was paramount that such figures were brought to future Schools Forum meetings during 2025, which would enable Forum Members to understand how future planning was progressing, illustrating failures and successes.
- Forum Members expressed concern that while there had been significant work undertaken regarding the LFI recently, the figures were still trending upwards. There did not appear to be any fundamental changes being made at the top level despite the funding increases.
- Officers **AGREED** to produce a report considering the revised modelling for the March 2025 meeting of the Schools Forum, which would also provide the latest forecast for the 2024-25 financial year, pupil numbers and average costs.
- A Forum Member raised a concern as to whether the new Element 3 conditions of funding were based upon a misinterpretation of the DSG guidance relating to academies and the audit function of the Local Authority. Officers confirmed that they would seek clarification from the ESFA regarding the LA's jurisdiction to carry out audit assurance checks or whether the ESFA could provide such assurance. The Chair requested that a report on the outcome of this clarification be brought to the March 2025 meeting of the Schools Forum. This was **AGREED** by officers.
- The Vice-Chair queried as to how long a historic commitment was maintained for. Officers confirmed that there were no remaining historic commitments. The appendix within the report illustrated what could be a historic commitment according to the available guidance.

7.4 The Norfolk Schools Forum **RESOLVED** to **CONSIDER** and **COMMENT** on the following:

- Information provided for the 2025-26 Dedicated Schools Block allocations and other DfE grants.
- The funding announcements in relation to the High Needs Block
- The funding announcements in relation to the Schools Block
- The funding announcements in relation to the Early Years Block
- The funding announcements in relation to the Central School Services Block

## 8. Early Years Funding Formula 2025-26

8.1 Officers introduced the report, which set out confirmation of the early years funding rates that Norfolk would receive for 2025-26 as well as the proposed rates paid to providers. This followed the principles agreed by the Norfolk Schools Forum following the early years consultation and subsequent principles recommendation in November 2023.

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

- The formula remained essentially the same as for 2024-25, with the same proportions used. The only change was to propose an increase in the pass through of funding by 0.5%, from 96% to 96.5%.
- The approach for supplements across all funding streams also remained as before. There was an aim to reduce the use of supplements, with the only one existing at present being the Mandatory Deprivation Supplement.
- The SEN Inclusion Fund (SENIF) was to be increased; however, this was a complex piece of work to be undertaken.

8.3 The following points were raised and discussed:

- A Forum Member noted that while the proposed 0.5% reduction in centrally retained funds was correct, there was a need to compare costs between 2023-24 and 2024-25, as there was no comparable data to back up the 0.5% reduction. An officer acknowledged there had been some efficiency savings found within the team over the past 12 months. It was **AGREED** that cost data from the previous years' table would be included in the January 2026 report to the Schools Forum.
- A Forum Member queried the implications of the efficiency savings of the Local Authority Team, given the increase in support in schools through the ZIP scheme. Officers stated that the efficiency savings had largely been tweaks over the last 12 months, however, the functions of the team would need to be examined in the future. This would be part of the remit of the Early Years Consultative Group and the LFI Reference Group. The bulk of support was concentrated in two areas, these being SEND Inclusion or in Sufficiency Sustainability Governance.
- A Forum Member asked if the team was involved in the wraparound care grant. Officers commented that as this grant was separately funded, this was not reflected within the figures of the report. A separate team was involved with this grant.
- The Norfolk Schools Forum unanimously **AGREED** the recommendations in the report on a show of hands

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

1. To **AGREE** the pass through of funding to providers be increased from 96% to 96.5%
2. To **RECOMMEND** the proposed final 2025-26 early years formula made in line with the recommendations from the Norfolk Schools Forum in November 2023.

## 9. Planned Growth (Pupil Variations) 2025/26

9.1 Officers introduced the report, which informed the Norfolk Schools Forum of pupil variations in the Authority Proforma Tool (APT) submission for the 2025/26 academic year.

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

- The pupil variations were conducted for academies and schools which were undergoing changes, or for new and growing schools. The APT had the October 2024 census numbers built into it, which would be used to fund primary and secondary schools/academies. Schools undergoing changes would be modelled to see how they could change from the following September. The figures in the report represented assumptions from September 2025 onwards. Schools were funded partially through the October census and partially from the September increase onwards.
- Norfolk received £2.67m of Growth Funding within the 2025-26 DSG Schools Block allocation.



- A separate table illustrating the pupil numbers of the four schools which were adjusted in 2023-24 was circulated to Forum Members prior to this meeting. There had been an overestimation of five pupils overall across the four schools. It had been previously agreed at a Schools Forum meeting that estimated pupil numbers would not be retrospectively adjusted, except in cases of significant error.

9.3 The following points were raised and discussed:

- The Chair queried the definition of “significant error,” as this was potentially too vague. A rethink could be required to make this more precise, given that schools were in an era of tightening budgets year on year.
- A Forum Member noted that the figures provided for Cringleford Prep School stated an estimate of 30 extra pupils each year. It was queried as to what work the Local Authority conducted to validate cohort estimated. An officer stated that the 30 pupil figure had been agreed as a minimum number for three years. This was guaranteed through the APT and DfE and therefore could not be adjusted.
- A Forum Member requested clarity regarding growth criteria given falling numbers of children in certain communities. Officers confirmed that the estimates were calculated in conjunction with admissions teams, planning teams and trust, with the figures then triangulated for accuracy. It had been previously agreed to not adjust the criteria unless a significant error was discovered.

9.4 The Norfolk Schools Forum **RESOLVED** to **NOTE** the report.

## 10. Early Years Consultative Group

10.1 Officers introduced the report, which gave an overview of the Early Years Consultative Group, its role, and the composition of its membership.

10.2 It was noted that the relationship between the Consultative Group and the Schools Forum was to be considered during the review of the latter’s constitution.

10.3 The following points were raised and discussed:

- Forum Members requested clarity on the reporting functions of the Consultative Group and where the minutes of their meetings were published. Officers **AGREED** to consider this as part of the Schools Forum constitution review.
- A Forum Member stressed that representation from child minders was paramount for the Consultative Group to be a success.

10.4 The Norfolk Schools Forum **RESOLVED** to **NOTE** the report.

## 11. Norfolk Schools Forum Forward Work Plan

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

11.2 A report on the High Needs Block modelling was added to the agenda for the March 2025 meeting of the Schools Forum.

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

## **12. Any Other Business**

12.1 There was no other business to consider.

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

13.1 The next meeting of the Norfolk Schools Forum was confirmed for **9am on Wednesday 26 March 2025**, to take place in the **Edwards Room** at **County Hall**

**There being no other business, the meeting closed at 11:35**

**Martin White, Chair  
Norfolk Schools Forum**



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