

# Norfolk Schools Forum

Date: **Wednesday 26 March 2025**  
Time: **9am**  
Venue: **Edwards Room, County Hall, Martineau Lane,  
Norwich, NR1 2UA**

## **Membership**

Martin White (Chair)  
Stuart Allen  
Adrian Ball  
Helen Bates  
Stephen Beeson  
Martin Colbourne  
Steven Dewing  
Lacey Douglass  
Bob Groome  
Glyn Hambling  
Carole Jacques  
Owen Jenkins  
Peter Pazitka  
Joanne Philpott  
Sarah Porter  
Rachel Quick  
Sarah Shirras  
Matthew Smith  
Daniel Thrower  
Joanna Tuttle  
Vicky Warnes

## **Organisation**

Nebula Federation  
Mile Cross Primary School  
Diocese of Ely Multi Academy Trust  
Roman Catholic Church Diocese  
Norwich Diocesan Board of Education  
City College Norwich  
Sapientia Education Trust  
Freelance Early Years Advisor  
National Education Union  
Unity Education Trust  
Earlham Nursery School  
Broad Horizons Education Trust  
St. John the Baptist Multi Academy Trust  
Ormiston Academy Trust  
Unity Academy Trust  
The Wherry School  
The Hive Federation  
Sheringham Woodfields School  
Wensum Academy Trust  
Aylsham High School  
National Education Union

## **Representing**

Maintained Primary Governors  
Maintained Primary Schools  
Maintained Academies  
Diocese Representative  
Diocese Representative  
16-19 Representative  
Maintained Academies  
Early Years Representative  
Joint Consultative Committee  
Alternative Provision Representative  
Maintained Nursery Schools  
Maintained Academies  
Maintained Academies  
Maintained Academies  
Maintained Academies  
Special School Academies  
Maintained Primary Schools  
Maintained Special Schools  
Maintained Academies  
Maintained Secondary Schools  
Joint Consultative Committee

## **Officers:**

Michael Bateman	Assistant Director – SEND, Strategic Improvement and Early Effectiveness
Martin Brock	Accountant (Schools, Special Educational Needs and Early Years)
John Crowley	Assistant Director – Intelligence and Education Sufficiency
Dawn Filtress	Dedicated Schools Grant Strategic Lead
Samantha Fletcher	Assistant Director – Education Strategy
Jane Hayman	Director of SEND and Inclusion
Sarah Jones	Director of Partnerships, Inclusion and Practice
Nicki Rider	Assistant Director – SEN and Alternative Provision Strategy and Sufficiency
Sara Tough OBE	Executive Director of Children’s Services
James Wilson	Director of Sufficiency Planning and Education Strategy

**For further details and general enquiries about this Agenda  
please contact the Committee Officer:**

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# Agenda

1. **Welcome from the Chair**  
*0900 to 0905*
  - To include the noting of an academy representative resignation and the arrangements to replace
2. **Apologies for Absence**  
*0905 to 0910*
3. **Minutes**  
To approve the minutes of the meeting held on Friday 31 January 2025  
*0910 to 0920* **Page 3**
4. **Matters Arising**
  - **Summary of Actions from January 2025 Schools Forum** **Page 13**
5. **Strategic Planning (including Local First Inclusion)**
  - **Local First Inclusion Programme Update, Impact and KPIs** **Page 17**
  - **DSG Modelling** **To follow***0930 to 1045 (Information and Discussion)*  
**Coffee Break**
6. **Pupil Variations 2025-26** **Page 35**  
*1100 to 1110 (Information and Discussion)*
7. **Norfolk Schools Forum Constitution and Ways of Working** **Page 37**  
*1110 to 1140 (Information and Discussion)*
8. **Non-DSG Consultations** **Page 58**  
*1140 to 1210 (Information and Discussion)*
9. **Forward Work Plan** **Page 69**  
*1210 to 1220 (Information and Discussion)*
10. **Any Other Business**  
*1220 to 1230*
11. **Date of Next Meeting**

**Martin White**  
**Chair, Norfolk Schools Forum**

Date Agenda Published: Wednesday 19 March 2025



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# 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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Minutes Item No.	Agenda Item	Action	To Do	By Whom	Response
6.3, bullet point 1	Strategic Planning (including Local First Inclusion)	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. <b>Officers AGREED to provide a stronger reflection on key performance indicators and timeline of expected impact in future reports to the Schools Forum.</b>	Extra narrative to be included in the March 2025 LFI report to Schools Forum and beyond.	Michael Bateman / Jane Hayman	
6.3, bullet point 5	Strategic Planning (including Local First Inclusion)	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. <b>An officer confirmed that dates for Phase 2 had been finalised and AGREED to follow up the communications behind this.</b>	ZIP comms to be chased up and sent to stakeholders	Jane Hayman / Jonathan Nice	

Schools Forum Action Note – Friday 31 January 2025

6.3, bullet point 11	Strategic Planning (including Local First Inclusion)	Following a suggestion from the Vice-Chair, <b>officers AGREED to provide a summary of comments on this item to the LFI Executive Group at their future meeting. It was also AGREED to review the constitution of the LFI Executive Group.</b>	Summary of comments from the minutes of this meeting to be sent to LFI Executive Group. LFI Executive Group constitution to be reviewed.	Samantha Fletcher	Summary sent to Chair. This will be promptly sent to the chair following each meeting
7.3, bullet point 3	Strategic Planning (including Local First Inclusion)	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. <b>An officer AGREED that the terms of the Group needed to be reconsidered, to potentially look at a different model.</b>	Schools Finance Consultative Group terms to be reviewed	Samantha Fletcher / Dawn Filtness	A Finance consultative group for LA maintained schools will be reestablished for the remainder of this academic year and the finance consultative group will be considered as part of the constitution review.
7.3, bullet point 6	Proposed Schools Budget 2025-26	Forum Members requested <b>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.</b>	Long term action for January 2026 Schools Forum	Martin Brock	

Schools Forum Action Note – Friday 31 January 2025

7.3, bullet point 12	Proposed Schools Budget 2025-26	<b>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.</b>	Report to be produced for March 2025 Schools Forum meeting	Martin Brock / Dawn Filtness	
7.3, bullet point 13	Proposed Schools Budget 2025-26	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. <b>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.</b>	Report to be produced for March 2025 Schools Forum meeting	Dawn Filtness	

Schools Forum Action Note – Friday 31 January 2025

8.3, bullet point 1	Early Years Funding Formula 2025-26	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 <b>AGREED</b> that cost data from the previous years' table would be included in the January 2026 report to the Schools Forum.	Long term action for January 2026 Schools Forum	John Crowley	
10.3, bullet point 1	Early Years Consultative Group	Forum Members requested clarity on the reporting functions of the Consultative Group and where the minutes of their meetings were published. <b>Officers AGREED to consider this as part of the Schools Forum constitution review.</b>	Extra element of Schools Forum constitution review	Samanatha Fletcher / John Crowley	



# Schools Forum

Item No: 5

<b>Report title:</b>	<b>Strategy Part 1 – Local First Inclusion Programme Update, Impact and KPIs</b>
<b>Date of meeting:</b>	<b>26 March 2025</b>

## Executive summary

The Local First Inclusion (LFI) Programme is nearing the 2<sup>nd</sup> year anniversary since its formal start following Secretary of State approval in March 2023 of the Safety Valve agreement. The programme continues to deliver the majority of projects and initiatives in line with their intended purpose and within intended timelines, but significant challenges remain in being able to reduce in year and cumulative deficit for the High Needs Block, and challenges remain with key indicators related to the ongoing rise in requests for specialist provision.

This report to Schools Forum (Part 1) is focussed on the programme of projects being delivered, impact and setting out a period of reflection to ensure that the programme governance is working for its intended purpose of supporting and challenging that delivery in the short, medium and long term.

We continue to await government announcements regarding the anticipated national SEND reforms (summer term 2025) and also await DfE response to our revised submission and offer to work in partnership set out to them in December last year.

In the meantime, we continue to deliver the programme and to report to Schools Forum, to the Council's Scrutiny Committee and to the LFI Executive Board and Programme Delivery Group in addition to increasingly co-producing new solutions and approaches within the LFI Reference Group with a cross-section of Norfolk school leaders.

### **Schools Forum are asked to:**

- **Consider the information provided and to provide feedback and comment with regard to programme progress, impact and KPI's**
- **Consider the leadership role that Schools Forum members can play in increasing inclusivity in mainstream schools in Norfolk**

## **1. Introduction**

- 1.1 We will continue to report on Local First Inclusion (LFI) at each Schools Forum meeting, however, increasingly we need to take account that the strategic (rather than directly financial) updates to Schools Forum will occur within a similar reporting timeline to both the LFI Executive Board and to Norfolk County Council Scrutiny Committee.
- 1.2 We are currently reviewing the terms of reference / model of operation for the LFI Executive Board to ensure that Members of that Board (six of which are taken from Schools Forum) receive the right level / kind of information to enable the required support and challenge. This work is progressing in advance of, and as part of, the May LFI Executive Board meeting and is likely to also inform the best use of parallel reporting to Schools Forum; reducing any risk of duplication and ensuring that there is clarity on the purpose of reports to the different groups and related two-way communication process between the LA and education representatives / education settings.
- 1.3 It has also been determined within Norfolk County Council governance that a report on LFI will be made to the NCC Scrutiny Committee on a quarterly basis. Following on from an initial 'position statement' to the November Scrutiny Committee the regular and frequent report starting on 19 March (with this date coinciding with publication of March Schools Forum reports). It is necessary, therefore, to consider the forward plans for NCC Scrutiny Committee, Schools Forum and LFI Executive Board to ensure that reporting complements rather than competes and, whilst the themes within the respective reports will over-lap, we need to ensure that the level of detail and focus/intent of these different reports matches the governance requirements of each group and their membership.
- 1.4 For example, the March report to NCC Scrutiny Committee has a 'spot-light' on outcomes data for children and young people with SEND alongside a 'spot-light' on the further roll-out of zone working, together with links to the NCC Cabinet Report in January that contained the detail of the DSG consultation outcome and budget planning for the new financial year. Therefore, the March reporting to Schools Forum will not duplicate the full detail of those aspects (a link is provided below for ease of reference to the full NCC Scrutiny report) but will instead summarise the outcome data from that report and with a specific focus on the next stage development of a range of KPI's for the LFI Programme.

*Note: link to NCC Scrutiny Committee, noting LFI report is Item 6. on that agenda and on pages 4-36 [Document.ashx](#)*

- 1.5 At this point in time many of the challenges remain in the SEND system in Norfolk. Schools, settings and colleges are under substantial strain, all of the support services in the system are experiencing very high levels of demand, and all of the specialist provision is operating at or beyond capacity. We are also still anticipating substantial reform at the national level, but do not have details at this moment about what that will deliver and how it might alleviate challenges in the short or longer terms.
- 1.6 However, looking at the data and intelligence across the programme, we can now see genuine evidence of positive impact in numerous areas and signs that the investments and transformations we have made together are taking effect. The sections which follow show a combination of data for all of Norfolk, and examples from particular projects, where impact is being seen. The school and community teams are building an evidence base of impact, it continues to be the case that our SRB programme is succeeding for most children in relation to re-integration to mainstream, and we are avoiding potential exclusions from school in many instances as a direct result of positive action. As a county we are now seeing numbers of EHCPs requested start to reduce for the first time, which might begin to indicate the systemic effect of these individual projects and impacts.
- 1.7 We need to be cautious with this data, it's a complex picture; the trends could change again, and, in some areas, we are yet to see the change we want for children and young people. However, equally, we should remember that the Local First Inclusion Programme is a long term one, and we knew that it would take time for impact to be felt consistently in all areas and we should be optimistic that once the core of our operating models in relation to zones, the teams around schools, the new AP model and all the new specialist provision has been delivered we will see the early signs for optimism contained in this paper becoming embedded consistently across the county.

## **2. High level SEND & AP outcomes information**

- 2.1 The Local First Inclusion programme and the Norfolk Area SEND & AP Strategy are focussed on a dual aim of ensuring children and young people with SEND and those requiring alternative provision access support more effectively and earlier whilst we also ensure that we 'live within our means'.
- 2.2 Assessing improvements to outcomes for children and young people with SEND is an ongoing process across Children's Services, education and health providers and because of the 0-25 age range of our statutory responsibilities for SEND

provision through Adult Services is also a key aspect of improvement activity. Ultimately it is the Ofsted/Care Quality Commission Area SEND & AP Inspections that assess the quality of provision and support for children and young people.

2.3 Ofsted/CQC set out a revised inspection framework in January 2023 and with the assessment of local area arrangements for SEND & AP now resulting in one of three statements, these are that:

- *The local area partnership’s SEND arrangements typically lead to positive experiences and outcomes for children and young people with SEND. The local area partnership is taking action where improvements are needed.*
- *The local area partnership’s arrangements lead to inconsistent experiences and outcomes for children and young people with SEND. The local area partnership must work jointly to make improvements.*
- *There are widespread and/or systemic failings leading to significant concerns about the experiences and outcomes of children and young people with SEND, which the local area partnership must address urgently.*

2.4 We will always ensure that the information regarding outcomes is set within the local and national context and, currently, the main narrative regarding that context has been of an ever-increasing rate of identified SEND within both the SEN Support and EHCP cohorts and, also, ever-increasing requests for specialist placements.

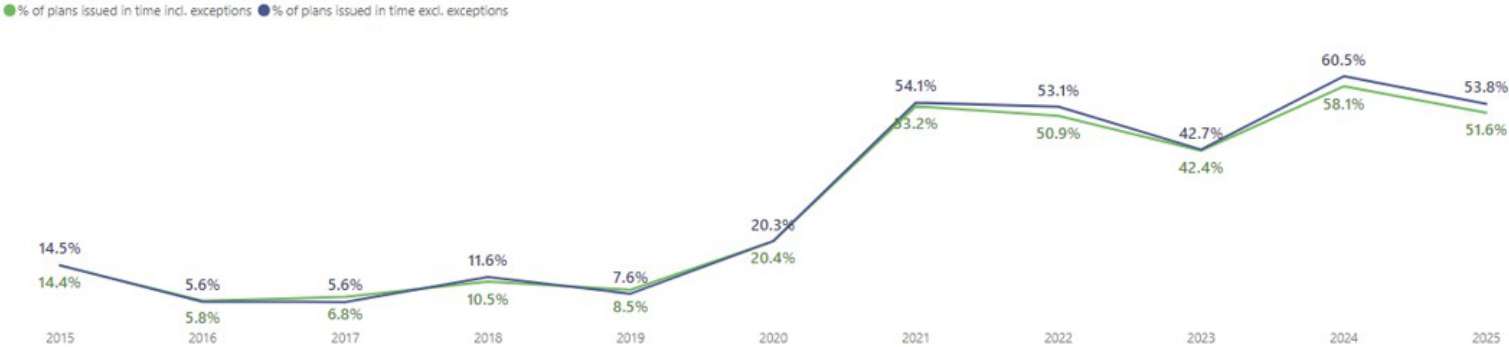
2.5 Norfolk’s rate of EHCP (total volume) and requests for new assessments place us in the top quartile of the large county council’s comparison group of LA’s. We are also in the top quartile in relation to the rate of tribunals that are lodged by parents.

2.6 It should be noted that due to the reporting timeline for national figures the published rate for Norfolk of EHCP new assessments completed within 20 weeks is the 2023 figure (published in May/June 2024) and, at 43%, was below the national average for the same period of 50%. Our outturn performance for 2024, to be published nationally in May/June 2025, will demonstrate an increase to 61%.

	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
<b>EHCP No.</b>	6,689	7,753	8,671	8,735	10,736	11,078
<b>%</b>	3.2	3.3	3.8	4.1	4.7	5.6
<b>New EHCP issued</b>	655	1,253	1,032	1,093	2335	2032
<b>National EHCP</b>						

%	3.1	3.3	3.7	4.0	4.3	4.8
<b>SEN Support No.</b>	15,081	15,993	16,138	16,898	17,412	17,806
<b>%</b>	12.4	13.1	13.1	13.6	13.9	14.3
<b>National SEN Support %</b>	11.9	12.1	12.2	12.6	13.0	13.6

Norfolk EHCP Timescale completion rate



- The volume of EHCP issued remains high and above the previous year – 327 issued Jan / Feb 2025, 317 issued 2024
- The percentage of plans issued out of timescale has increased slightly, as out of timescale plans are issued. The percentage of plans that are overdue has declined.

2.7 Whilst LA performance measures for completing initial EHCP assessments within 20 weeks does not have a direct link to the original requirements of, and measures within, the LFI programme they are relevant when considering the overall ‘health’ of the SEND System in Norfolk. We have removed the direct link between funding and EHCPs in Norfolk and, therefore, a late EHCP assessment may not materially impact on the provision for an individual child or young person. However, a late plan can contribute to a lack of parental confidence in professionals who are supporting them and, therefore, when conversations are required regarding specificity of provision and/or specialist placement late plans do not assist those conversations. Our improvement to 61% in time last year provides the foundation for further improvement and, when only a small minority of cases are late, then the LA teams can have enhanced opportunities alongside school leaders to explore mainstream inclusion options.

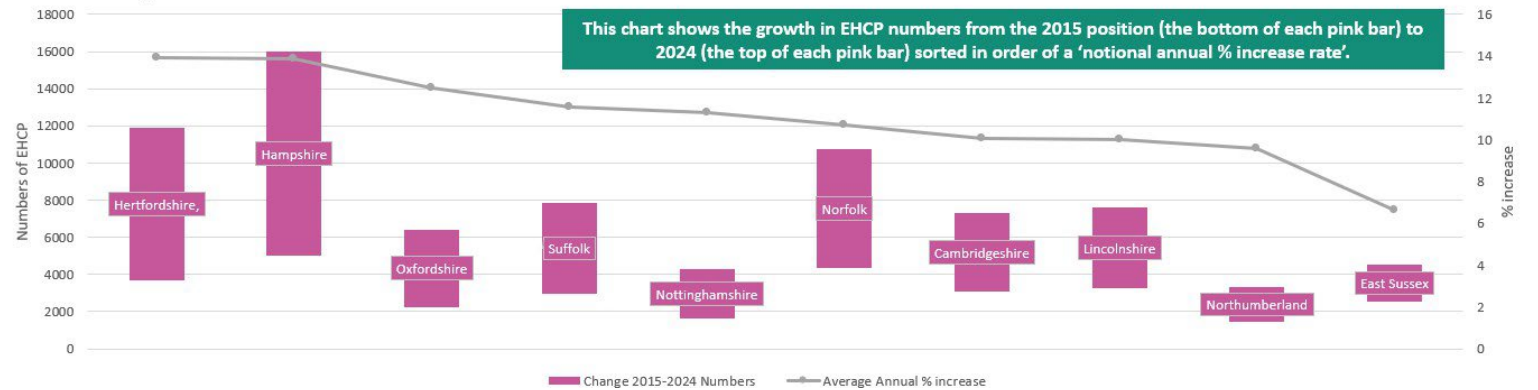
2.8 This increase in performance has been set within the context of ever-increasing referral rates. However, significantly, we have recently seen a change in the trend. This academic year we have seen a lower level of requests for new EHCPs – consistently at a lower level than the previous academic year.

## 2024 SEN2 Information: EHCP changes over time 2015-2024

EHCP (rate per 10k 0-25) – County Councils

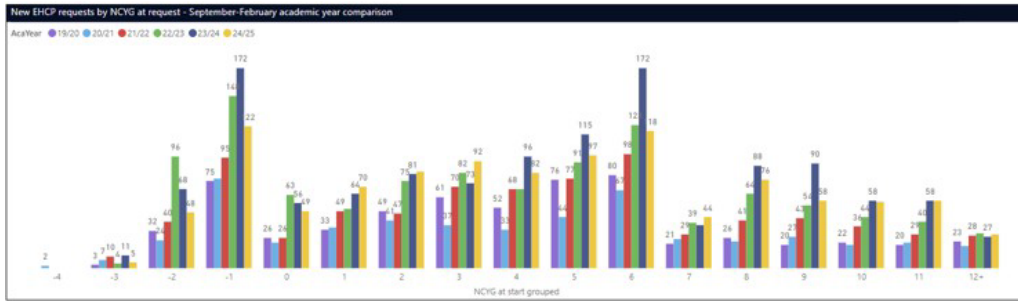


EHCP numbers: changes Jan 2015-Jan 2024



2.9 The information above compares Norfolk’s growth in EHCPs since the 2014 reforms alongside other medium / large county councils.

2.10 The information below illustrates the start of a reverse of the year-on-year trend of increases in referrals for new EHCPs. Of particular note is the fact that the largest reductions in referrals have occurred for the transition year group cohorts. We know that transitions are often a trigger for EHCP referrals and have put a significant focus on these cohorts within the programme and, in the targeting of the School and Community teams, seeking to build parental confidence and plan transitions together. It is therefore not unreasonable to draw a link between our intervention and the reduction we have begun to see in the system in Norfolk. Clearly, we need to be somewhat cautious about this trend and whether it will persist, but we should be encouraged by the impact of the action we have taken together.



- Fewer requests each month than previous academic year
- Jan / Feb – 23% reduction in requests
- Decline is being driven by a reduction in requests from providers and parents – particularly around transition cohorts: Early Years (-1, -2), upper key stage 2 (5/6) and also upper key stage 3 (8/9).
- Starting to see fewer agree to assess decisions. Jan / Feb – 10% reduction. No indication of an increase in requests coming back into the process after refusal.

2.11 There is always a significant focus on the completion of EHCP assessments within 20 weeks as a key national indicator, but it is also important to consider other indicators of performance. For example, we have successfully decreased the backlog of EHCP annual reviews from 40% to 23% over the past two years, and we continue to perform well in completing amended EHCPs as part of the annual ‘phase transfer’ process each February, with latest performance at 97% of EHCP’s amended in line with the phase transfer deadline of 14 February (enabling 1.5 terms of planning for transition).

2.12 These indicators are important as, respectively, they enable support and provision put in place by schools to be monitored and changes to support considered in a timely manner, whilst with good phase transfer performance we can ensure that parents and schools have certainty regarding which school children and young people will transition to ahead of September each year.

2.13 In addition to Ofsted/CQC’s assessment of the effectiveness of our support for children and young people it is important remind ourselves that, fundamentally, we are concerned with meeting the special educational needs of children and young people and ensuring that they make progress and can attain to their highest possible potential. As illustrated below, the key educational outcome measures for all children and young people, including those with SEND, sets out the challenge to raise attainment.

- End of Primary Key Stage 2 attainment of expected standards in Norfolk is well below the national average, for all pupils. The gap is wider for pupils at SEND support and closer for those with an EHCP.
- Secondary attainment at Key Stage 4, is more in line with national averages, and better for those with SEN, particularly with an EHCP. Attainment 8 captures the average total grade achieved by students across 8 subjects, double weighting English and mathematics to give a total of 10 grades. The average Attainment 8 scores students with no identified SEN, attainment is consistently just below the national average. For students at SEN support attainment improved in 2024 to be back in line with the national average. Attainment of students with an EHCP has consistently been above the national average

### **3. Further development of LFI programme and KPIs**

- 3.1 The Local First Inclusion programme continues to evolve as it nears the 2<sup>nd</sup> year anniversary of the programme. It is clear that individual projects in the programme, largely, are progressing as originally anticipated. However, it is equally clear that the key indicators linked to the original plan based on addressing both in-year and cumulative deficit are now not in line with those expectations. We do remain of the view though that the main strategic plan is correct, to reduce our reliance on higher costs independent sector provision through an investment in more state-funded specialist provision alongside a focus on mainstream inclusion for the vast majority of children and young people and increasingly through SEN Support.
- 3.2 Therefore, we are now embarking on a second stock-take/refresh of the programme (as would be expected on an annual basis with a complex programme of this scale and nature) and in addition to reflecting on the projects that we have underway we are also reflecting on the governance arrangements for LFI. Last year we made changes by introducing an independent chair for the LFI Executive Board and by making changes to our internal delivery group with greater support and challenge being provided by ‘corporate’ colleagues across the council. We need to reflect on governance to make sure that LA colleagues are not duplicating their reporting and from the perspective of our colleagues in schools and other partners that their time is focussed and directed where it has most benefit to the programme.
- 3.3 Throughout this refresh of governance we need to collectively ensure that the communication of the LFI programme aims and objectives, progress across



projects and, also, the collective challenges that we face are understood by all. Understanding of the LFI programme through those various lenses cannot be achieved by the LA alone, and we need to ensure that there is a two-way communication process at all times. This refresh of governance will take place alongside a reflection of the touchpoints between Local First Inclusion, Norfolk Area SEND & AP Strategy, Learning Ambition and considering the partnership boards for these and how the alignment with Schools Forum and the Council's committee meeting public domain reporting.

- 3.4 To assist with an update at this stage of the programme, and in line with reporting taking place to NCC Scrutiny Committee this month also, we have set out below a summary of the key developments within the programme to date and the next stage work and key challenges we need to collectively address:

### Key Developments

1

Zone development & improvements to Norfolk's SEND and Inclusion Support Model

Definition and delivery of zone data packs

We are building on the successful implementation of our new School & Community teams that were established in the first year of the LFI programme. We have 15 teams operating across the new School & Community Zones with a focus on the SEN Support cohort. Our ambition has always been to ensure that ultimately all of our services focussed on schools (including for early years and post 16) will operate through this local footprint.

We also have a commitment with our health colleagues to join up services such as speech & language therapy in this way too. Operating a 'team around the school' approach we will be ensuring that increasingly access to services (and funding) will be centred on relationship-based model rather than a referral model. We believe that this will ensure that access to services is responsive to the needs and context of individual schools, rather than a one size fits all approach, and of course ultimately responsive to C&YP needs. We have also launched a new phone-line, for parents and professionals, as part of a new SEND & Inclusion Front Door and we will build onto this initial offer the full model during the current academic year.

In addition to the support being provided by the LA we are also enhancing the challenge in our partnership working with schools. We have developed an Inclusion Dashboard and this will enable LA to School challenge, regarding inclusion, but will also facilitate peer to peer discussions between schools in each Zone.

2

Ordinarily available provision plus ESP process development

Following the success of enabling 100% take up from Norfolk mainstream schools to our INDES (individual needs descriptors) framework we are able to support and challenge schools regarding their overall offer of inclusion. We have a clear benchmark of effective inclusive practice and are able to link this to access to funding and services. For example, where schools are demonstrating effective inclusion for cohorts of C&YP we are able to support this ongoing inclusion through a funding mechanism (within our overall Element 3 funding offer) to establish Enhanced Specialist Provisions (ESPs). This provides funding stability for schools and enables parental confidence within the mainstream offer.

3

Element 3 funding process and value

We set out significant detail regarding Element 3 funding changes in the January Cabinet report and we have signalled in the forward plan section below that we will focus on this in the next report to Scrutiny Committee, in June, ahead of the September 2025 implementation date. Members are asked to note that a report to the Schools Forum, occurring within a similar timeframe to this Committee meeting, is providing an update on those plans for Element 3 funding and reporting here in June will reflect the outcome of those ongoing discussions with school leaders. A link to those report is provided in the Background Papers section of this report.

4

School Led AP Model incl. S19 AES

We have secured full engagement across Norfolk’s secondary school leaders within the design phase of our new school led AP model. We have designed a model closely aligned to the DfE 3 Tier AP model, from the national plan, and have benefitted from the expertise of Mark Vickers MBE (CEO Olive Academies) in the AP working group alongside Norfolk school leaders. We are launching our new managed move service and working with the MAT that operates the Norfolk AP provision to redesign the model to ensure that we can repurpose the current provision as PEX reduction occurs in future years and we have now established the first of a series of new model AP centres, at Kings Lynn Academy, prior to full county-wide roll out which will be informed by the impact of this initial pilot centre.

5

Commission / Use INMSS differently

We continue to engage with this sector on two fronts, to secure best possible fees for current / new placements alongside our core messaging regarding the significant reduction in placements over the timeline of our LFI programme.

We have had some, limited, successes with fee reductions – albeit these are reductions from very high initial requests – and we will continue this work on a school-by-school basis. We have also had to acknowledge that our simple narrative at the start of the LFI programme regarding the sector, i.e. largely higher cost and lower quality provision compared to state-funded special schools, is now needing to be more nuanced as the outcome of Ofsted inspections for this sector is demonstrating improvements in the quality of education. This is positive for Norfolk C&YP already placed in these schools but is being used by the sector also to reaffirm their position in the Norfolk specialist market.

# 6

## School to School Outreach

The success of Norfolk's state-funded special schools, through recognition from Ofsted of their routine Good & Outstanding judgements, is also mirrored in the credibility of this sector for their support for mainstream schools, both as the Specialist Partner for Specialist Resource Bases but also the 'S2S' outreach model.

To ensure greater co-ordination of the Outreach offer to mainstream schools the LA is taking the management of the service 'in-house' and will broker the support between special school and mainstream and will be able to do this as part of the overall School & Community Zone developments. Also, as part of the current DSG consultation process, we are exploring options for an increase to the Outreach offer and seeking feedback from mainstream schools on how best to position this within an overall offer of mainstream school support; all focussed on meeting more needs at SEN Support.

# 7

## Building new SEND places:

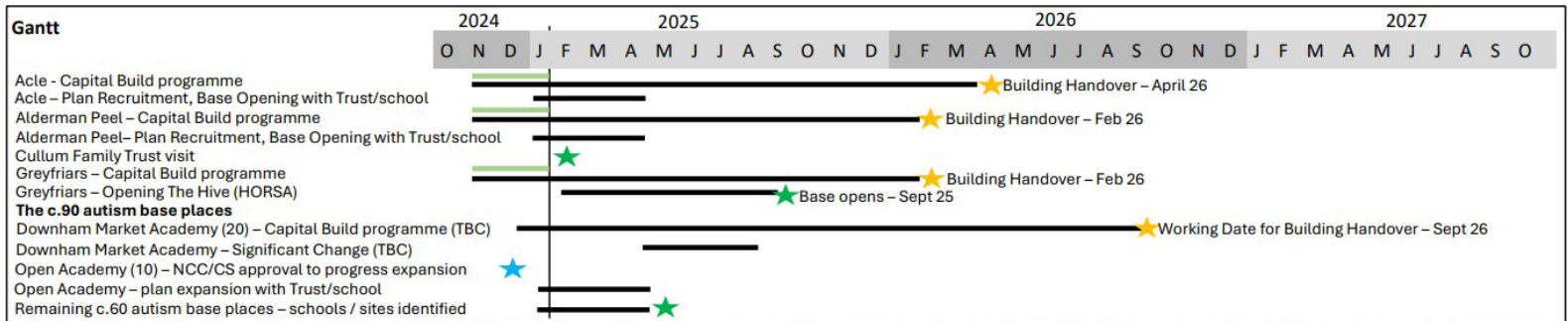
- a) Autism SRB's
- b) SEMH SRB's  
SLCN  
SRB's/SHIP's
- c) Existing & satellite  
Special  
Schools
- d) Schools #4 & 5

We are continuing our ambitious increase of specialist provision with a range of new Specialist Resource Bases, AP Centres and new special schools. In parallel we continue to increase and improve the current Norfolk special school estate within our revised SEND & AP Sufficiency plan.

Initial new SRB's/AP centres are now operational with a clear trajectory for the opening dates of the remainder of bases over the next two years, following completion of feasibility studies, public consultation and decision making via the DCS and Regional Director for maintained schools and academies respectively. In addition, and to protect the new placements for the children that we believe have the greatest need and will travel the shortest distance, we have changed our special school admission process to ensure that our consultations with headteachers differentiate between requests based solely on parental preference and those with professional consensus.

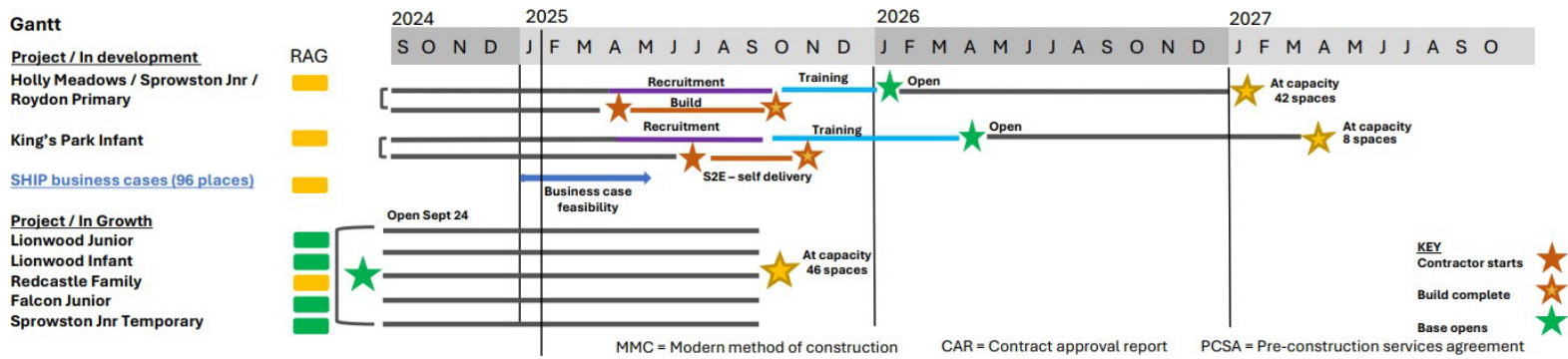
However, the DfE have still not set out a clear process for the delivery of the two new special schools and this now means that opening dates will be at the end of 2027 at the very earliest rather than 2026.

## Building New SEND places – All ASD SRBs

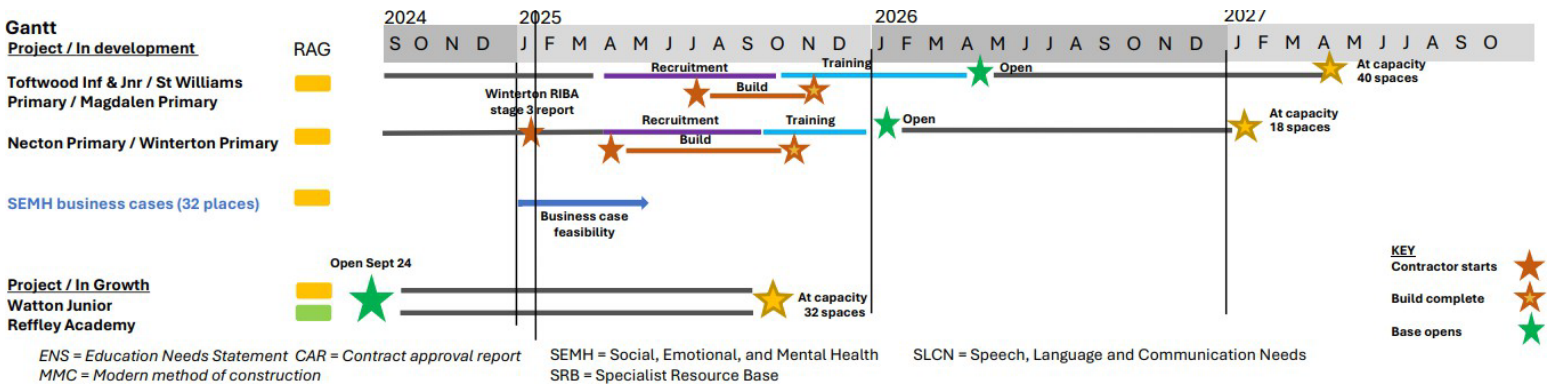


ASD = Autism Spectrum Disorder SRB = Specialist Resource Base NAS / CFT = National Autistic Society / Cullum Family Trust SEMH = Social, Emotional & Mental Health SHIPs = Specialist Hubs of Inclusive Practice

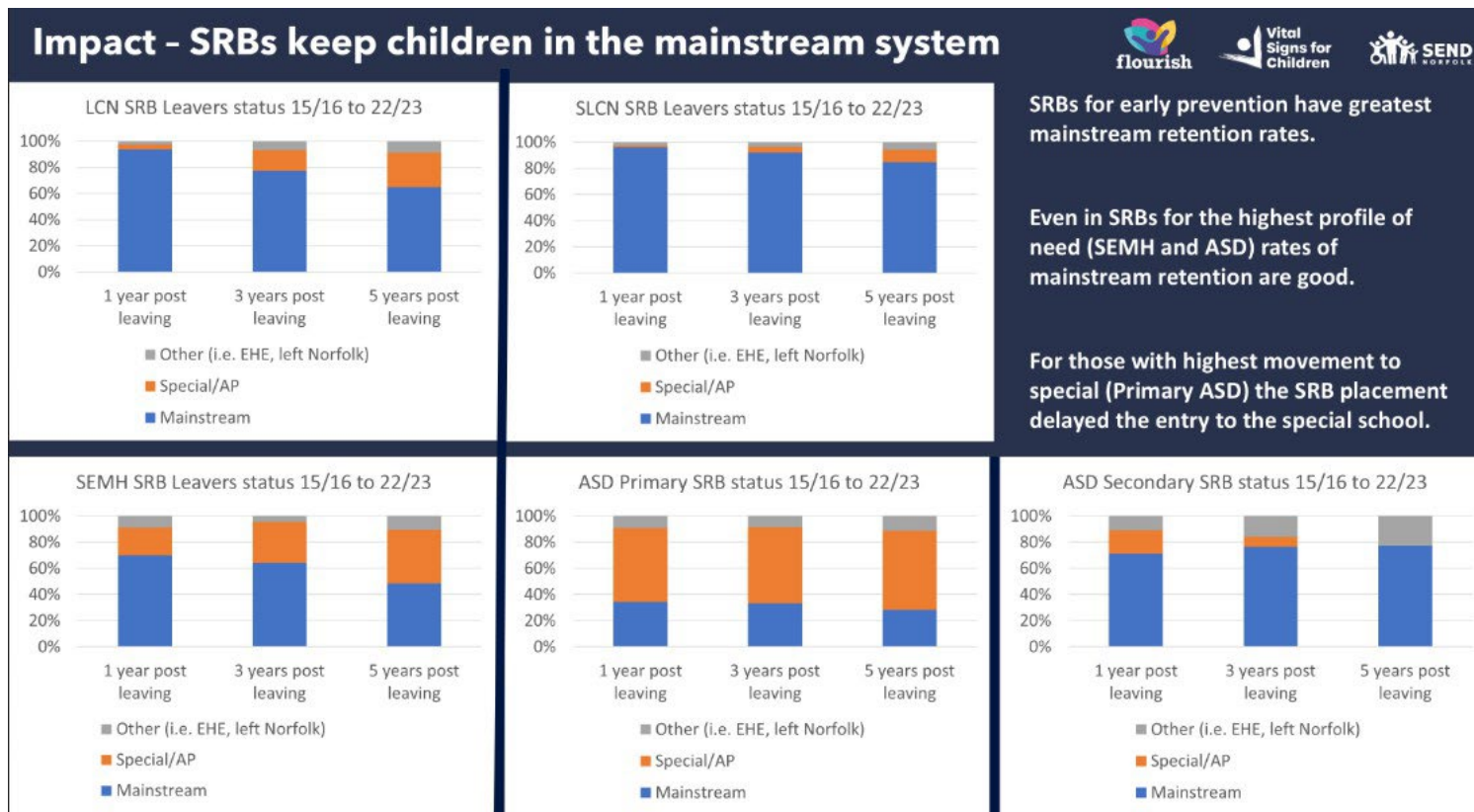
## Building New SEND places – All Specialist Hubs of Inclusive Practice (SHIPs)



## Building New SEND places – All SEMH & SLCN SRB's



3.6 Our specialist resource base provision (SRB) is gaining national recognition and the vast majority of pupils attending the SRBs are remaining, as intended, in mainstream education after the period of support in the base – with particularly high rates of re-integration for children with Speech and Language and Cognition and Learning needs



3.7 We are also starting to see positive changes regarding exclusions. Whilst the headline figures still illustrate high permanent exclusion rates for Norfolk, the Alternative Provision centre working in Kings Lynn, where we have been able to demonstrate impact on reduction of permanent exclusions.



3.8 Through the work of local authority Inclusion Advisers, working with three schools within the town through 'local planning meetings', there has been an identified reduction in permanent exclusions:

- During 23/24 academic year, 16 initial permanent exclusions (PEX) were lodged and, following 4 withdrawals, 12 were confirmed PEX for the year for these schools
  - During 24/25 academic year (to date), 3 initial permanent exclusions (PEX) have been lodged and, following 2 withdrawals, only 1 confirmed PEX for this year for these schools
- 3.7.18 The team are confident that this pattern can be replicated across the county as the model of Team Around the School meetings and the new Alternative Provision centres are rolled out.

3.9 In previous reports to Schools Forum we set out the initial implementation phase of the School & Community Teams, we have also provided information on their development in reports to NCC Scrutiny Committee in November and have updated this in the report to Scrutiny Committee this month also. In summary:

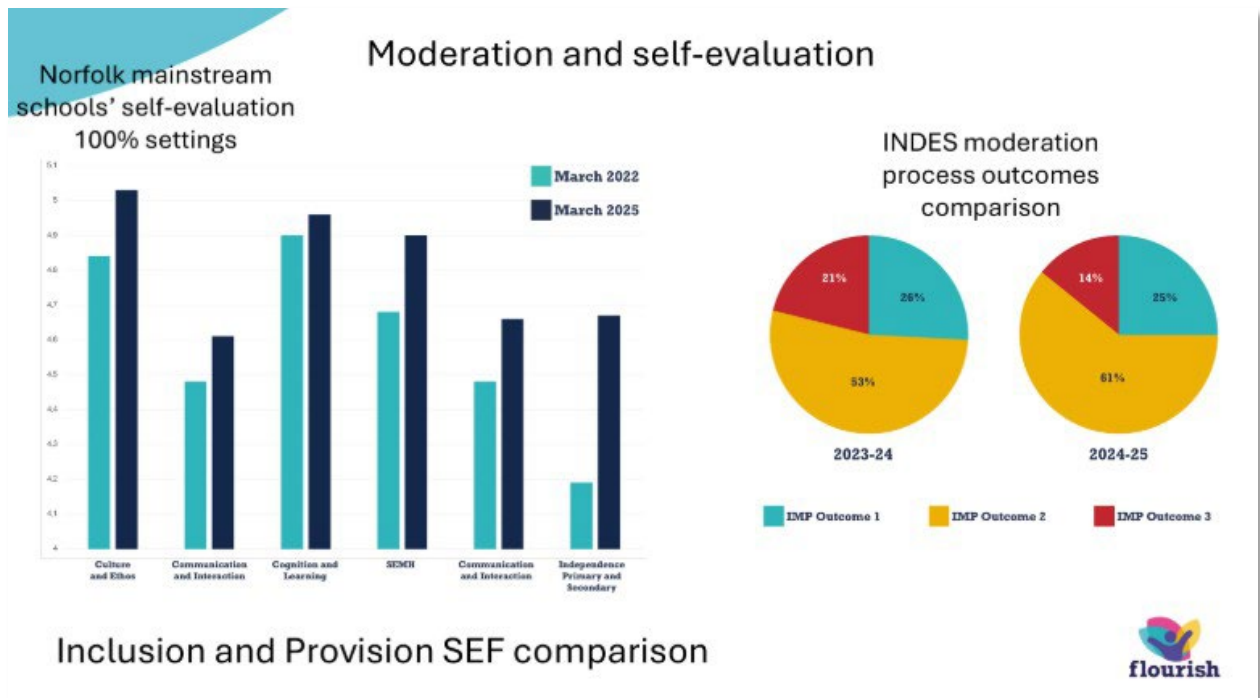
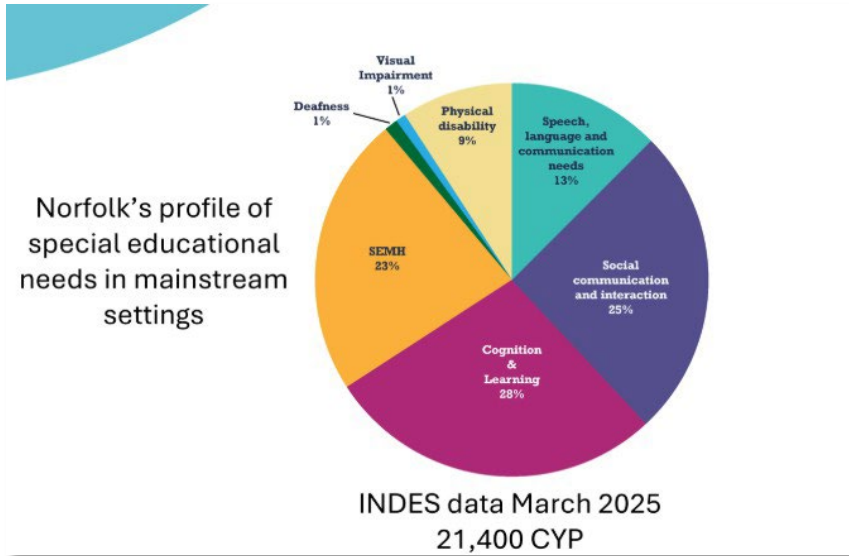
- the 15 teams are operational and in their first full year of operation worked directly with over 1000 children through a combination of family and school work within this cohort
- In 68% of cases supported by the new teams, the risk of a local mainstream school being unable to meet need has been mitigated as a result of the support
- In 83% of cases supported by the teams, the risk of exclusion has been mitigated as a result of the intervention
- In 71% of cases supported, the risk of becoming a school refuser has been mitigated as a result of the intervention

3.10 The School & Community Teams are one element of the new approach to 'team around the school' alongside other work within each Zone and also the new phone-line that was established in September 2024. Figures from the initial analysis of the new phone line show that:

- 1,740 calls received (19 per day average)
- call time duration within a range of between 17 mins and 67 mins
- of the total calls received to date:
  - 49% from professionals (with queries regarding individual children)
  - 19% from professionals (with queries regarding cohorts of children/whole school support)
  - 32% from parents/carers

- of these calls, the themes relating to the need for advice and guidance were frequently related to risk of suspension/exclusion and behaviour management as well as general guidance regarding education, health and care plans
- within the different groups calling the line, the highest frequency of theme was
  - from professionals: education setting feeling unable to meet child/young person's needs and requiring specific advice
  - from parents/carers: feeling that the education setting their child attended was unable to meet their child/young person's needs
- initial feedback ratings regarding the outcome of contact to the phone line has shown that
  - 9.5/10: being listened to and understanding of the situation
  - 8.4/10: feeling confident about what to do next
  - 9.1/10: would recommend the line to family & friends
- Examples of comments made regarding this part of the new service offer are:
  - *“Emma was very professional but still had a really friendly manner. It was lovely to be able to speak to someone rather than an answering phone. Just having someone answering the phone and questions I had made such a difference as it often feels like you are banging your head against a brick wall. I really hope that this service is a success because it really will be a life line of help for parents/carers, like myself, that are struggling.”*
  - *“Keep this service it's vital and it is so nice to actually have somewhere you feel you are heard as a parent as when dealing with send children and reaching out to most if not all services you literally have to expect no response doors to be closed in your face which just adds to the frustration and the desperation you have trying to seek help for your children. Every time I have rang this service I have been met with listening ears and proactive helpful and consistent support. It's a shame this service hasn't been available longer it's very much needed!”*

3.11 We are now in a position where we can combine feedback regarding new ways of working alongside more established information, for example the rich picture that the INDES data provides will be vital as we further develop our work in Zones with schools.



3.12 We are aware that we are at the start of these new ways of working and, whilst it is encouraging to note the positive responses, we are equally aware that teething issues continue and are being addressed and that we need to keep working hard to ensure that the county-wide roll out continues at pace, and that each zone that is established is able to benefit from the learning of the previous zones.

Challenges



3.12 However, despite these successes, the overall position remains one of considerable challenge, in particular:

- An ongoing rise in exclusions and a reliance on the LA to provide educational provision directly, via tutors and online resources, for children not currently able to attend school for reasons of medical absence and/or resistance to admissions within mainstream schools whilst assessments regarding special educational needs are clarified
- Delays to some capital schemes due to the outcome of feasibility studies, for example, highlighting increased costs due to the need for full new build compared to assumptions of possible refurbishment of existing spaces, and now a significant delay to the opening of the two new special schools due to DfE processes.
- There are still considerable wait times for key health services, in particular in relation to assessments for neurodiverse children and support for children with emotional and mental health needs
- A continued rate of referral for special school provision which is well above the national average and well above what can be afforded within the allocated High Needs Block
- We continue to see an ongoing rise in referrals for Education Health and Care Plans and special schools, despite the record investment in mainstream funding and the availability of new 'free at the point of delivery' services.

#### Next Steps

3.13 As part of the ongoing review of the LFI programme, and aligned to the governance changes mentioned above, we are also reflecting on the most effective way to report on progress and challenges across the programme to the various audiences that have a stake in the programme. Therefore, we are currently working on a revised set of KPIs to ensure that, in addition to the key indicators regarding the High Needs Block recovery plan, we are also able to set out direct and proxy indicators to assess the impact following delivery of projects. We anticipate these encompassing:

- EHCP referral rate
- Rate of requests for special schools
- Occupancy rate and rate of maintaining mainstream school placement following SRB placement (time limited type only)
- Permanent exclusion rates
- Attendance rates for SEND cohort
- Key Stage performance for SEND cohort
- Rate of mediation and tribunal activity

3.14 We are developing a ‘top ten’ suite of indicators to drive delivery of the programme internally and want to consider a similar approach to the top 3 or top 5 of indicators that will be of most benefit for regular reporting to the LFI Executive Board and to Schools Forum.

#### **4. Schools Forum are asked to:**

**Schools Forum are asked to:**

- **Consider the information provided and to provide feedback and comment with regard to programme progress, impact and KPI’s**
- **Consider the leadership role that Schools Forum members can play in increasing inclusivity in mainstream schools in Norfolk**


#### **Officer Contact**

If you have any questions about matters contained in this paper, please get in touch with:

**Officer Name:**            **Tel No:**                    **Email address:**

Michael Bateman

[michael.bateman@norfolk.gov.uk](mailto:michael.bateman@norfolk.gov.uk)

 <p><b>IN TRAN</b> communication for all</p>	<p>If you need this report in large print, audio, Braille, alternative format or in a different language please contact 0344 800 8020 or 0344 800 8011 (textphone) and we will do our best to help.</p>
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# Schools Forum

Item No: 6

<b>Report title:</b>	<b>Pupil Variations 2025-26</b>
<b>Date of meeting:</b>	<b>26 March 2025</b>

## Executive summary

To inform Schools Forum of final amendments to pupil variations applied in the LA's Authority Proforma Tool (APT) submission for 2025-26, following the initial presentation of draft pupil variations at the January 2025 Schools Forum meeting.

Minor amendments were necessary in the final calibration of the mainstream funding formula/APT submission for 2025-26, plus the correction of an incorrectly input Rates figure against the new Silfield school which was found in final checks.

Pupil variations applied to the LA's Authority Proforma Tool submission for 2025-26 mainstream schools' budgets were presented to Schools Forum in January 2025 in respect of schools/academies where:

- there has been, or is going to be, a reorganisation, or;
- a school has changed, or is going to change, its admission limit.
- new schools, based on estimated pupil numbers (and/or guaranteed pupil numbers)

The finance team worked with the LA's place planning, school organisation, and admissions teams, as well the schools/trusts involved to ensure accuracy and agreement of any pupil variations submitted to DfE in the January APT submission.

Financial information for Norfolk's 2025-26 final pupil number variations is provided in **Appendix A**, showing a comparison to the previous estimates.

The final cost of pupil variations including the full formula cost of the newly opening Silfield school reduced from £718,561 (the January estimate) to £640,388 in the final APT submission.

Only minor changes were necessary in the final APT submission for calibration of the final funding formula to the funds available. This resulted in small changes for most of the schools with pupil variations.

The majority of the overall reduction compared to the January estimate is due to the correction of an incorrectly input Rates figure for the new Silfield school. For this reason, the appendix shows an additional comparison for the new Silfield school excluding the Rates estimates to isolate the impact of the pupil variation amendment.

**No action required: Information only.**

## Appendix A

## Effect of Pupil Variations 2025-26 Financial Year

School	Reason	Oct '24 Census NOR	Budget based on Oct '24 NOR	Estimated Pupils September'25	January 2025 Estimate (5/12th x Oct '24 NOR + 7/12th x Sept '25 NOR)	January 2025 Estimate of Pupil Variation	FINAL APT Submission	Change Estimate vs Final	Note
			£		£	£	£	£	
White House Farm	Growing school	278	1,417,251	345	1,596,528	179,277	179,187	-90	Factors increased, MFG reduced
Wymondham College Prep School	Growing school	400	1,982,925	430	2,069,637	86,713	86,713	0	At Minimum Per-Pupil Level
Cringleford Prep School	Growing school	21	281,551	51	338,337	56,787	56,644	-142	Factors increased, MFG reduced
Silfield Primary School	New free school	0	0	30	242,167	242,167	164,245	-77,922	Factors increased, Rates correction*
Hethersett Academy	Expansion	1214	7,979,545	1255	8,133,162	153,617	153,599	-19	Factors increased, MFG reduced
		<b>1,913</b>	<b>11,661,272</b>	<b>2,111</b>	<b>12,379,833</b>	<b>718,561</b>	<b>640,388</b>	<b>-78,173</b>	

\*NEW School - Rates estimates removed from funding calculation to show comparison:

Silfield Primary School	New free school	0	0	30	163,543	163,543	163,946	403	Factors increased, no MFG (new school)
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# Schools Forum

Item No: 7

<b>Report title:</b>	<b>Norfolk Schools Forum Constitution and Ways of Working</b>
<b>Date of meeting:</b>	<b>26 March 2025</b>

## Executive Summary

The Norfolk Schools Forum Constitution is scheduled for review, with the last revision conducted in March 2019. This report aims to present a proposed structure for the constitution, which will be reviewed and discussed in upcoming meetings with the intention of finalising by July 2025.

The main objectives of this report are:

- To propose a revised constitution structure for initial review in May and final consideration in July.
- To review school membership representation in alignment with the current school system.

The Schools Forum will be consulted throughout the review process to ensure broad representation and the inclusion of diverse perspectives.

### **Schools Forum are asked to consider: -**

- Are there any sections/content that members of forum consider should be included?
- Are there any subgroups that should be explored for inclusion in the forum as part of the constitution?
- How often and at points of the year should the forum meet to ensure effective governance and decision-making?

### **School Forum are asked to decide:**

- For Schools Forum representatives to be appointed for a term of 4 years.
- To increase the mainstream school representatives to 12 members
- To fill the 3 mainstream Academy vacancies using the existing nominating and voting processes.
- To engage with trade unions for future representation of trade unions as part of the constitution review
- To allow trade unions to nominate substitutes for the next two meetings.

## **1 Introduction**

- 1.1** The constitution underwent its last review in March 2019, Appendix 1 is the current constitution and terms of reference.
- 1.2** The Schools' Forum has agreed to undertake a review of the constitution. The objective of this report is to present a proposed structure for the constitution for review and discussion, culminating in a finalised version for consideration by the Schools' Forum at the July meeting. A draft version will be presented at the May meeting for initial review before the final version is submitted to the July forum. Each representative group will be consulted appropriately during the constitution review process.
- 1.3** Given the importance of ensuring representation of our current school system, membership is reviewed in this report to enable decisions regarding school membership, which will then be incorporated into the final constitution.

## **2 Proposed Constitution Structure**

- 2.1** The draft constitution outline is provided as Appendix 2. The sections have been reviewed from our current constitution.  
The proposed structure will be developed and presented at the May & July forum meetings.
- 2.2** Subgroups: A section has been added to reference subgroups that should be included. The updated constitution will include the opportunity for an annual review of subgroups.
- 2.3** Frequency & Regularity of Meetings: The current constitution indicates a minimum of 4 meetings annually. Currently, there are 7 meetings planned.
- 2.4** Schools Forum are asked to consider: -
  - 2.4.1** Are there any subgroups that should be explored for inclusion in the forum as part of the constitution?
  - 2.4.2** Are there any sections/content that members of forum consider should be included?
  - 2.4.3** How often and at points of the year should the forum meet to ensure effective governance and decision-making?

## **3 Membership**

- 3.1** The proposed sections of the new constitution relating to membership are included in Appendix 2

### **3.2 Term of Office**

The current term of office is four years, after which members may stand for re-election. Officers propose to maintain this term of office within the updated constitution.

### **3.3 Review of Membership**

The Local Authority is required to regularly review the membership of the Schools Forum in accordance with the Department for Education's operational guidance. This review must also consider representation of mainstream schools based on updated pupil numbers.

### **3.4 Schools Forum Structure**

The membership of the Schools Forum must reflect the proportion of pupil numbers across different school sectors as specified by the Schools Forums (England) Regulations 2012. The DfE's guidance, [Schools Forum Operational and Good Practice Guide](#), also outlines the requirements for Schools Forum membership. School members must comprise at least two-thirds of the Schools Forum membership. Primary schools, secondary schools, and academies need to be proportionately represented based on the total number of pupils registered in them. The current list of members and their terms of office can be found in Appendix 3.

### **3.5 School Members**

Local Authority Maintained Schools: If the local authority maintains the following types of schools, each should be represented on the Schools Forum:

- Primary Schools
- Secondary Schools
- Special Schools
- Nursery Schools
- Pupil Referral Units (PRUs)

Each group can include Headteachers or their representatives and Governors. The updated constitution will specify that Primary LA Maintained schools representatives must have at least one headteacher and one governor.

### **3.6 Academies**

There must be representation for:

- Mainstream academies, including free schools, University Technical Colleges (UTCs), and Studio Schools.
- Special academies, including free schools.
- Alternative Provision academies, including free schools.

Academy representation is not limited to principals, senior staff, or governors.

### 3.7 Current Norfolk School Forum Member Representation

Position	Total
School Members	15
Primary maintained Headteacher	2
Primary maintained Governor	1
Secondary maintained school representative	1
Mainstream academy representatives	5
Mainstream academy representatives vacancies	2
Maintained Special School representative	1
Maintained Nursery School representative	1
Academy Special school representative	1
AP Academy representative	1
Non School Members	6
16-19 representative	1
Early Years PVI representative	1
C of E Diocesan Rep	1
Roman Catholic Rep	1
JCC Primary Rep	1
JCC Secondary Rep	1

As required by the regulations, once all vacancies have been filled at least two-thirds of Schools Forum members will be school members.

### 3.8 Mainstream Representation

The representation for mainstream schools based on October 2024 census data suggests that an additional mainstream academy representative, or a reduction in the overall number of mainstream school members, should be considered to remain broadly proportionate, based on the proportion of pupils indicated below:

-

Pupils	Number of pupils	Proportion of total pupil numbers (%)
Primary Maintained	27,507	25.81%
Secondary Maintained	1,112	1.04%
Primary and Secondary Academies	77,968	73.15%
Total Pupils	105,475	

Schools Forum currently has a total of 11 school members for mainstream schools (maintained primary schools, maintained secondary schools and mainstream academies), once all vacancies are filled. A review of the current representation based on the latest mainstream pupil numbers is below.



<b>11 Mainstream Forum Representatives</b>			
	Proportion of total Pupil number %	Proportional number of representatives	Current Number of representatives
Primary Maintained	25.81%	2.84	3 representatives, so this is broadly proportionate
Secondary Maintained	1.04%	0.11	1 Representative, there must be at least 1 representative so current membership is correct
Academies	73.15%	8.05	7 representatives, Currently, Schools Forum will have 7 mainstream academy representatives once vacancies are filled. This is not proportionate to current representation

To ensure the distribution of representation is to remain proportional, increasing or decreasing the overall number of mainstream representatives would be required. The table below provides a comparison of the distribution of representatives when there are 10, 11 or 12 mainstream representatives in total.

	Proportion of total pupil Numbers %	Proportional number of representatives	Updated distribution of representatives based on the total number of reps
<b>10 Mainstream Forum representatives</b>			
Primary Maintained	25.81%	2.58	2
Secondary Maintained	1.04%	0.10	1
Academies	73.15%	7.32	7
<b>11 Mainstream Forum Representatives</b>			
Primary Maintained	25.81%	2.84	2
Secondary Maintained	1.04%	0.11	1
Academies	73.15%	8.05	8
<b>12 Mainstream Forum Representatives</b>			
Primary Maintained	25.81%	3.10	3
Secondary Maintained	1.04%	0.12	1
Academies	73.15%	8.78	8

### 3.9 Mainstream School Members

Based on the review of current mainstream membership, to ensure a viable number of mainstream Primary School representatives the recommendation is to increase the number of mainstream school representatives to 12 with one additional academies representative. This will result in the need to fill three vacancies

3.10 The process for electing to the vacancies would take place immediately following the forum using the current voting mechanisms. Each Academy Trust will be asked to nominate a prospective member, and each Academy trust, with at least one school in Norfolk, able to submit a vote.

3.11 **Non School Members:** Current Non-School Memberships consists of

<b>Non School Members</b>	<b>6</b>
16-19 representative	1
Early Years PVI representative	1
C of E Diocesan Rep	1
Roman Catholic Rep	1
JCC Primary Rep	1
JCC Secondary Rep	1

3.12 As part of the constitution review, there will be consideration of whether we have adequate representation across our system for non-school members. Currently, trade unions representation is JCC Primary and JCC Secondary, which no longer exist in that format. Therefore, it is proposed that we engage with trade unions to determine the future approach regarding the trade union representatives, since the current structures (Secondary JCC and Primary JCC) no longer exist.

3.13 The current term of office for the existing trade union representatives has expired. We have approached the trade unions to request that they nominate current members as substitutes for the meetings whilst the selection process is being confirmed and arranged.

3.14 Schools Forum are asked to decide:

- For Schools Forum representatives to be appointed for a term of 4 years.
- To increase the mainstream school representatives to 12 members
- To fill the 3 mainstream Academy vacancies using the existing nominating and voting processes.
- To engage with trade unions for future representation of trade unions as part of the constitution review
- To allow trade unions to nominate substitutes for the next two meetings.

## **4 Summary of Considerations & Decisions**

### **4.1 Schools Forum are asked to consider:**

- Are there any subgroups that should be explored for inclusion in the forum as part of the constitution?
- Are there any sections/content do members of forum consider should be included?
- How often and at points of the year should the forum meet to ensure effective governance and decision-making?

### **4.2 School forum are asked to decide:**

- For Schools Forum representatives to be appointed for a term of 4 years.
- To increase the mainstream school representatives to 12 members
- To fill the 3 mainstream Academy vacancies using the existing nominating and voting processes.
- To engage with trade unions for future representation of trade unions as part of the constitution review
- To allow trade unions to nominate substitutes for the next two meetings

# Appendix 1: Current Constitution & Ways of working

## Norfolk Schools Forum

### Constitution and Terms of Reference

#### TITLE

The title of the Committee will be “Norfolk Schools Forum” and will be referred to hereafter as “The Forum”.

#### ROLE/FUNCTION

The Forum’s functions are:

- Formula change (including redistributions) must be consulted and inform governing bodies of all consultations.
- Finance issues – gives a view and informs all governing bodies of all consultations:
  - arrangements for pupils with special educational needs
  - arrangements for use of pupil referral units
  - arrangements for early years provision
  - administration arrangements for the allocation of central government grants
- To give a view on any variations to the operation of the Minimum Funding Guarantee where less than 50% of the Authority’s pupils are affected
- To agree, by phase, the amounts of funding to be retained as central expenditure under the following specific areas:
  - Contingencies
  - Administration of Free School Meals
  - Insurance
  - Licences/subscriptions
  - Staff costs – supply cover
  - Support for minority ethnic
  - Pupils/underachieving groups
  - Behaviour support services
  - Library and museum services
  - School improvement
- General duties for maintained schools – would be decided by the relevant maintained school members.
- Decides on the central spend on the criteria for allocating funding from:
  - Funding for significant pre-16 growth

- Funding for good or outstanding schools with falling rolls
- Decides for each line central spend on:
  - Early years block provision
  - Funding to enable all schools to meet the infant class size requirement
  - Back-pay for equal pay claims
  - Remission of boarding fees at maintained schools and academies
  - Places in independent schools for non-SEN pupils
  - Services previously funded by the retained rate of the ESG
  - Admissions
  - Servicing of Schools Forum
- Decides for each line central spend on:
  - Capital expenditure funded from revenue – agreed prior to April 2013
  - Contribution to combined budgets – agreed by Schools Forum prior to April 2013
  - Existing termination of employment costs – approved prior to April 2013.
  - Prudential borrowing costs - commitment must have been approved prior to April 2013.
- It is deemed good practice that the authority will inform school forum on central spend on:
  - High needs block provision
  - Central licences negotiated by the Secretary of State.
- Decides on carry forward deficit on central expenditure to the next year to be funded from the schools budget.
- Approves Scheme of Financial Management changes (school members only)
- It is deemed good practice that the Schools Forum are asked to give a view on length of office of members.
- Determine voting procedure
- Elects Chair of School Forum.
- Contracts – gives a view and informs all governing bodies.

## MEMBERSHIP

(a) The membership of the Forum will be:

### **School members – 15 members**

3 Primary Headteachers or governors

1 Secondary maintained school representative

- 1 Special School Headteacher
- 1 Nursery School Head teacher or governor
- 1 Special School Academy representative
- 1 AP Academy representative
- 7 Academy representative – this is not restricted to principals, senior staff or governors

### **Non School members – 6 members**

- 1 16-19 representative
- 1 Early Years PVI representative
- 1 C of E Diocesan representative
- 1 Roman Catholic representative
- 1 JCC Primary representative
- 1 JCC Secondary representative

- (b) All school Members will be elected according to the process decided upon by their relevant constituency and all non-school Members will be nominated by their relevant bodies.
- (c) A headteacher representative means a principal, deputy headteacher, bursar or other person responsible for the financial management of the school.
- (d) Give the Education Funding Agency observer status at Schools Forum meetings, with the right to participate in discussions

## **TERMS OF MEMBERSHIP AND CONDUCT OF MEMBERS**

- (a) Members should abide by the National Code of Local Government Conduct: if a proposal directly affects an issue in which they might have a pecuniary interest a Member should declare that interest and withdraw from the meeting and take no part in the decision.
- (b) If a Member does not attend for three consecutive meetings, or send a substitute, then the Forum will determine at the third meeting whether that Member should continue to serve on the Forum.
- (c) A member of the Forum will hold office for a maximum of four years after which they must stand for reappointment if they wish to continue. A Member may resign at any time. There is no limit to the number of terms an eligible Member may serve. A new appointment or replacement Member will serve for a four-year term.

- (d) The appointment of any Forum member will end before the expiry of their term of membership if the member concerned ceases to hold the office by virtue of which they became eligible for appointment to the Forum.

## ELECTION OF CHAIRPERSON AND VICE-CHAIRPERSON

The Forum will elect a Chairperson and Vice-Chairperson annually. If necessary, this will be done by a majority of votes cast by individual Members. The Chairperson and Vice-Chairperson should be from different groups of the Forum, if possible. The Chairperson must not be an elected member or officer of the Local Authority.

## SECRETARIAT AND PROVISION OF ACCOUNT TO SCHOOLS

The LA will carry out the secretariat function of the Forum and be responsible for ensuring that a record is kept of each meeting. The secretariat will, as soon as reasonably possible, inform the governing bodies of schools maintained by the LA and academies of all consultations carried out in accordance with Part 3 of the Regulations. The LA will also inform all schools of the name of any member elected to the Forum within one month of the appointment.

## QUORUM/SUBSTITUTES

- (a) To be quorate there must be at least eleven Members in attendance.
- (b) Members may appoint a substitute with full voting rights provided the substitute fulfils the same criteria as the appointed Member.
- (c) The name of the substitute Member will be notified to the Secretary by the appointed Member prior to the start of the meeting.
- (d) Confine the voting arrangements to allow only schools and academy members and providers from the private, voluntary and independent sector to vote on the funding formula

## PROCEEDINGS

Meetings of the Forum will be held at least four times a year. Wherever possible, the notification convening a meeting, along with the full agenda, will be circulated at least 7 days before the meeting and minutes published promptly on their website

Hold public meetings as is the case with other council committees

Limit the number of other local authority attendees from participating in meetings unless they are a Lead Member with primary responsibility for children's services or education in the authority or for the resources of the authority, a Director of Children's Services (or their representative), the Chief Financial Officer (or their representative) or are providing specific financial or technical advice (including presenting a paper to the Forum)

It is within the rights of the Forum to set up working groups/sub groups to investigate issues requiring investigation

Subject to paragraphs 8 – 10 of the Schools Forum (England) Regulations 2012 the Forum may determine their own voting procedures.

## MEMBERS' EXPENSES

(a) All expenses of the Forum will be met by the LA and, in accordance with the Regulations, charged to the Schools Budget.

(b) Expenses for attendance at meetings will be reimbursed in accordance with the scheme approved by the Forum.

## URGENT DECISIONS OUTSIDE MEETINGS

If an urgent decision is required and there is insufficient time to convene a full Forum meeting, the Chair may decide to implement the following emergency procedure:

All members will be contacted by email (or telephone if they do not have email access) and asked to respond. The decision will stand if the majority of all members responding are in agreement. At least ten members must have responded and every effort should be made to contact each constituent group.



## **Appendix 2 Draft Constitution Outline**

### **CONSTITUTION OF THE NORFOLK SCHOOLS' FORUM**

The Norfolk Schools' Forum (hereafter referred to as "the Forum").

The requirement to establish a schools' forum comes from the Education Act 2002. The main purpose of the Forum is to consider aspects of the relationship between schools and the local authority relating to financial matters.

The Forum is a decision-making and consultative body in relation to matters concerning schools' budgets as defined in the School and Early Years Finance (England) Regulations 2014, the Schools Forum Regulations 2012 and the School Budget Shares (Prescribed Purposes) (England) 2002.

This document is divided into 3 sections:

- Terms of Reference of the Forum
- Membership of the Forum
- Operating Conventions of the Forum

## **TERMS OF REFERENCE**

*Appendix 4 gives further detailed information around the role / remit of Schools Forum and will be built into a term of reference for Norfolk schools forum*

## **MEMBERSHIP OF THE FORUM**

Composition

School Members

Election and Nomination of Schools Members

Non-School Members

Substitute Members

Participation of Observers

Council Officers and Elected Members

Resignations

Terms of Office

Failure to attend meetings

## **OPERATING CONVENTIONS OF THE FORUM**

Meeting Overview

Administration of Meetings

The Chair and Vice Chair

Quorum

Voting

Sub-Committees and Working Groups

Annual Consultation

Declaration of Interest

Reports

Expenses

Interpretation of the Constitution

Amendment of the Constitution

### Appendix 3 Current Membership

Name	Organisation	Role	Sector Represented	Elected	End of term in office
Carole Jacques	Earlham Nursery	Headteacher	Maintained Nursery Schools	30/09/2020	Sep-24
Bob Groome	National Education Union		Non School Member: Joint Consultative Committee	30/09/2020	Oct-24
Vicky Warnes	National Education Union		Non School Member: Joint Consultative Committee	01/09/2020	Oct-24
Steven Dewing	Sapientia Education Trust	Chief Financial Officer	Mainstream Academies	01/04/2022	Apr-26
Martin Colbourne	City College Norwich	Deputy Chief Executive	16-19	01/07/2022	Jul-26
Sarah Shirras	Hive Federation	Executive Headteacher	Maintained Primary Schools	01/12/2022	Dec-26
Martin White	Nebula Federation	Governor	Maintained Primary Schools	01/12/2022	Dec-26
Joanna Tuttle	Aylsham High School	Director of Business & Community	Maintained Secondary Schools	01/12/2022	Dec-26
Rachel Quick	The Wherry School, Free School	Principal	Special School Academies	01/12/2022	Dec-26
Joanne Philpot	Ormiston Education Trust	Headteacher	Mainstream Academies	30/03/2023	Mar-27
Glyn Hambling	Unity Education Trust	CEO	Alternative Provision	30/03/2023	Mar-27
Helen Bates	Roman Catholic Diocese	Assist Director	Roman Catholic Diocese	22/03/2023	Mar-27
Daniel Thrower	Wensum Trust	Chief Executive Officer	Mainstream Academies	01/05/2023	May-27
Matthew Smith	Sheringham Woodfields School	Business Manager	Maintained Special Schools	26/01/2024	Jan-28
Stephen Beeson	Diocese of Norwich Representative	CEO	Cof E Diocese	26/01/2024	Jan-28
Lacey Douglass	Freelance Early Years Advisor	Freelance Early Years Advisor	Early Years PVI	08/07/2024	Jul-28
Owen Jenkins	Broad Horizons Education Trust	Chief Executive Officer	Mainstream Academies	19/01/2025	Jan-29
Peter Pazitka	St John the Baptist Catholic Multi Academy Trust	Director of Finance and Operations	Mainstream Academies	28/01/2025	Jan-29
Stuart Allen	Mile Cross Primary School	Headteacher	Maintained Primary Schools	28/01/2025	Jan-29
Vacancy			Mainstream Academies		
Vacancy			Mainstream Academies		

## Appendix 4: Schools forum powers and responsibilities

Function	Local authority	Schools forum	DfE role
Formula change (including redistributions)	Proposes and decides	Must be consulted (voting restrictions apply). See schools forum structure document that informs the governing bodies of all consultations	Checks for compliance with regulations
Movement of up to 0.5% from the schools block to other blocks	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Contracts (where the LA is entering a contract to be funded from the schools budget)	Proposes at least one month prior to invitation to tender, the terms of any proposed contract	Gives a view and informs the governing bodies of all consultations	None
Financial issues relating to: <ul style="list-style-type: none"> <li>arrangements for pupils with special educational needs, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding</li> <li>arrangements for use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools and the arrangements for paying topup funding</li> </ul>	Consults annually	Gives a view and informs the governing bodies of all consultations	None

Function	Local authority	Schools forum	DfE role
<ul style="list-style-type: none"> <li>• arrangements for early years provision</li> <li>• administration arrangements for the allocation of central government grants</li> </ul>			
Minimum funding guarantee (MFG)	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval to application for exclusions

<p>De-delegation for mainstream maintained schools for:</p> <ul style="list-style-type: none"> <li>• contingencies</li> <li>• administration of free school meals</li> <li>• insurance</li> <li>• licences/subscriptions</li> <li>• staff costs – supply cover</li> <li>• support for minority ethnic</li> <li>• pupils/underachieving groups</li> <li>• behaviour support services</li> <li>• library and museum services</li> <li>• School improvement</li> </ul>	<p>Proposes</p>	<p>Maintained primary and secondary school member representatives will decide for their phase. Middle schools are treated according to their deemed status</p>	<p>Will adjudicate where schools forum does not agree LA proposal</p>
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Function	Local authority	Schools forum	DfE role
<p>General Duties for maintained schools</p> <p><input type="checkbox"/> Contribution to responsibilities that local authorities hold for maintained schools (<b>please see <a href="#">operational guide</a> for more information</b>)</p>	<p>Proposes</p>	<p>Would be decided by the relevant maintained school members (primary, secondary, special and PRU).</p>	<p>Adjudicates where schools forum does not agree LA proposal</p>

<p>Central spend on and the criteria for allocating funding from:</p> <ul style="list-style-type: none"> <li>• funding for significant pre-16 <a href="#">pupil growth</a>, including new schools set up to meet basic need, whether maintained or academy</li> <li>• funding for good or outstanding schools with <a href="#">falling rolls</a> where growth in pupil numbers is expected within three years</li> </ul>	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
<p>Central spend on:</p> <ul style="list-style-type: none"> <li>• early years block provision</li> <li>• funding to enable all schools to meet the infant class size requirement</li> <li>• back-pay for equal pay claims</li> <li>• remission of boarding fees at maintained schools and academies</li> <li>• places in independent schools for non-SEN pupils</li> <li>• admissions</li> <li>• servicing of schools forum</li> </ul>	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
<input type="checkbox"/> Contribution to responsibilities that local authorities hold for all schools			

<p>Central spend on:</p> <ul style="list-style-type: none"> <li>capital expenditure funded from revenue: projects must have been planned and decided on prior to April 2013 so no new projects can be charged</li> <li>contribution to combined budgets: this is where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources</li> <li>existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged)</li> <li>prudential borrowing costs – the commitment must have been approved prior to April 2013</li> </ul>	<p>Proposes up to the value committed in the previous financial year and where expenditure has already been committed.</p> <p>See table four page 31 to 35 for Information on historic commitments. Read <a href="#">establishing local authority DSG baselines</a> for more information.</p>	<p>Decides for each line</p>	<p>Adjudicates where schools forum does not agree LA proposal</p>
<p>Central spend on:</p> <ul style="list-style-type: none"> <li>high needs block provision</li> <li>central licences negotiated by the Secretary of State</li> </ul>	<p>Decides</p>	<p>None, but good practice to inform forum</p>	<p>None</p>
<p>Carry forward a deficit on central expenditure to the next year to be funded from the schools budget</p>	<p>Proposes</p>	<p>Decides</p>	<p>Adjudicates where schools forum does not agree LA proposal</p>
<p><b>Function</b></p>	<p><b>Local authority</b></p>	<p><b>Schools forum</b></p>	<p><b>DfE role</b></p>



Any brought forward deficit on de-delegated services which is to be met by the overall schools budget.	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Scheme of financial management changes	Proposes and consults the governing body and Head of every school	Approves (schools members only)	Adjudicates where schools forum does not agree LA proposal
Membership: length of office of members	Decides	None (but good practice would suggest that they gave a view)	None
Voting procedures	None	Determine voting procedures	None
Chair of schools forum	Facilitates	Elects (may not be an elected member of the Council or officer)	None

# Schools Forum

Item No: 8

<b>Report title:</b>	<b>Non-DSG Consultations</b>
<b>Date of meeting:</b>	<b>26 March 2025</b>

## Executive summary

The Non-DSG Consultations paper outlines the approaches taken by the local authority for consulting on the distribution of four grants received outside of the Dedicated Schools Grant (DSG) during the 2024-25 financial year. These grants include the Core Schools Budget Grant, Teachers' Pension Employer Contribution Grant, Teacher's Pay Additional Grant, and Early Years Budget Grant. The paper details the consultation undertaken for each grant, the feedback received, and the final decisions made by the LA.

It seeks feedback from the Schools Forum on future approaches to non-DSG grant consultations.

### **Schools Forum is asked to:**

- **Consider, and provide feedback, on approaches to future consultations for non-DSG grants received by the LA in-year.**

## 1. Additional Grants

The local authority received four grants outside of the DSG during the 2024-25 financial year for distribution to schools and early years providers.

The DfE/ESFA provided guidance and conditions to be met for distribution of the grants, including prescribed methodologies in some cases (e.g. for mainstream schools), but also required the LA to consult with certain school/provider types prior to deciding local methodologies for allocation to them.

The grants received were:

- **Core Schools Budget Grant** supporting teachers' pay award and increased support staff costs (consultation affecting special schools/AP only)
- **Teachers' Pension Employer Contribution Grant 2024** supporting teachers' pension increases (consultation affecting special schools/AP only)

- **Teacher's Pay Additional Grant** (consultation affecting special schools/AP only)
- **Early Years Budget Grant** – supporting teachers' pay award (all providers)

The approaches taken for consultation, or otherwise, by the LA for each of the grants are summarised in this paper.

## 2. Core Schools Budget Grant 2024-25<sup>1</sup>

The Core Schools Budget Grant for 2024-25 was announced 29<sup>th</sup> July 2024, with initial allocations published by DfE 26<sup>th</sup> September 2024.

The methodology required for funding for mainstream schools was clearly prescribed in guidance by the DfE/ESFA, and funding was allocated to schools in November'24.

The guidance for allocation of the grant to special and AP schools included a proposed methodology but it was more flexible and required the LA to consult with affected schools prior to making any allocations to them. The consultation was initiated in January'25 and it is acknowledged that this should have been enacted earlier but, given the DfE had not set forward any alternative methodology to a per pupil place allowance, the LA was anticipating the consultation to be a relatively quick, straight-forward process and, therefore, other key financial work was prioritised during the autumn term.

Special and AP schools were initially asked:

**Q.** Do you agree that the LA should allocate the new Core Schools Budget Grant to eligible providers on the same basis that it is received from the ESFA, at £610 per place for high needs settings based on the number of places paid to the LA as grant by the DfE using 2024 to 2025 academic year place numbers (as published by DfE) for special and AP academies, and 2023 to 2024 academic year place numbers for maintained special schools?

The 14 responses received by the LA (out of a possible 19) were as follows:

<b>Response</b>	<b>Number of responses</b>	<b>% of responses</b>
<b>Yes</b>	<b>12</b>	<b>85.71</b>
<b>No</b>	<b>2</b>	<b>14.29</b>

Minimal comments were received alongside the responses, but one identified a concern that the ESFA funding methodology overlooked the unique aspects of different schools, which would result in cost pressures. This is because the calculation does not fully consider the higher staff requirements due to educational and residential provisions or the smaller classroom sizes limiting pupil numbers. The comment also flagged concerns regarding the merging of future pay-related grants into one and that this may cause financial issues. The suggestion was that a distribution based on FTEs and salary costs would be fairer.

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<sup>1</sup> [Core schools budget grant \(CSBG\) 2024 to 2025 - GOV.UK](#)

Following feedback regarding the differential of staff ratios in different schools, especially as CSBG also includes funding towards support staff (rather than just teacher pay awards as with the other grants), LA Officers felt it was worthwhile to consider a second option basing CSBG allocations on proportion of top-up funding allocated for each school.

Officers acknowledge that there was the option to forego a second consultation following initial feedback and allocate on the majority view received from the first consultation. On balance, Officers decided a second consultation was important in the spirit of fair funding to present both options to affected schools, as each had its own merits.

In March'25, a 2nd follow-up consultation was undertaken and the LA asked schools/providers to indicate a preference for, and to comment on, two options:

**Option 1** - Allocate the new Core Schools Budget Grant to eligible providers on the same basis that it is received from the ESFA, at £610 per place for high needs settings based on the number of places paid to the LA as grant by the DfE (as published by DFE)

**Option 2** – Allocate the new Core Schools Budget Grant to eligible providers split on the basis of the proportion of top-up funding allocated to individual schools, reflective of the principle that the local formula takes into account differing levels of needs between schools/pupils, and the resulting staffing ratios required, through the top-up process.

The 14 responses received by the LA (out of a possible 19) were as follows:

<b>Response</b>	<b>Number of responses</b>	<b>% of responses</b>
<b>Option 1 – Replication of ESFA methodology</b>	<b>10</b>	<b>71.4</b>
<b>Option 2 – Use top-up-based methodology</b>	<b>4</b>	<b>28.6</b>

Comments were received from the majority of responders.

Responses in support of option 1 flagged concerns about the significant losses that would be caused for some special schools this late in the financial year if option 2 was implemented, and that schools had already integrated the ESFA approach into their budgets. Concern was also raised that option 2 lacked stability as top-up funding is unknown from year-to-year and that an alternative option did not receive majority support in the previous consultation. Concern was also expressed regarding the timing of this second consultation and its impact on financial planning. However, one response did confirm that there could be some benefits of option 2 and that it would be beneficial to have further consultation ahead of future year's funding distribution.

Responses in support of option 2 were that it would provide fairer distribution and concern that option 1 would provide insufficient funding for children with the highest needs who require additional staffing ratios (for example, due to very high medical needs) which could result in reduced admissions or needs not being able to be met.

After considering the feedback, the LA has made the decision to allocate CSBG in 2024-25 by replicating the ESFA methodology (Option 1 above) as this is the option most supported by the affected schools, as well as being simple, transparent and also the easiest for schools to estimate what their income could be for future years (unless there is a decision to change the methodology for future years). This is also the option which schools are most likely to have budgeted for as it aligns with the initial guidance from Government. The feedback in relation to option 2 has been heard and will be considered in relation to future year's funding distributions.

## **2.1 CSBG 2025-26 financial year<sup>2</sup>**

For mainstream schools the equivalent funding has already been included within the National Funding Formula as previously reported to Schools Forum, forming part of the now-published 2025-26 budget shares for mainstream schools.

The DfE have also announced that, for the first time, additional grant funding for mainstream schools with special units and resourced provision will be made as part of the National Insurance Contributions (NIC) support grant. Mainstream schools with units or resourced provisions will receive an allocation calculated on the basis of a flat rate per place, on top of the allocation that all mainstream schools receive.

For special and AP schools, the DfE/ESFA will be combining CSBG, the Teachers Pay Additional Grant (TPAG) and the Teachers' Pension Employer Contribution Grant (TPECG24) into one new single CSBG grant for special and AP schools. LAs have also received notification from DfE that the 2025-26 CSBG will also include the National Insurance Contributions (NIC) support package.

As part of the announcement of the NIC, the DfE published fresh guidance on 18<sup>th</sup> March of arrangements for allocation of the CSBG for 25/26 inclusive of the NIC. The DfE state within this guidance:

*The conditions of grant for CSBG 2025 to 2026 will be published separately alongside the allocations in May 2025. This will confirm the requirements set out below.*

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<sup>2</sup> [Core schools budget grant \(CSBG\) 2025 to 2026 for special schools and alternative provision: methodology - GOV.UK](#)

*Many local authorities have indicated to us that they have passed on to their eligible schools funding provided through the 2024 to 2025 TPAG, TPECG and CSBG at the rates and place numbers used to calculate their allocations. Some authorities have used alternative allocation methodologies for their schools, using the flexibility in the conditions of grant for 2024 to 2025, which recognises that the staffing and other costs schools face can vary between individual schools, depending on the complexity of their pupils' needs and other factors.*

*The methodology for the 2025 to 2026 CSBG provides the opportunity to retain these flexibilities and provide continuity for schools or move, subject to appropriate consultation, to a simpler approach that reflects the methodology used to allocate the funding to local authorities.*

The guidance also states that the new NIC element of the 25/26 CSBG can be treated differently, subject to consultation with schools. For avoidance of doubt, the full guidance on allocations is as follows:

*For allocations of funding in respect of the schools they currently maintain, academies they previously maintained, free schools located in their area and schools that provide hospital education, local authorities must comply with the following requirements in setting their local arrangements for passing on the 2025 to 2026 CSBG funding.*

*For the elements of funding that are a consolidation of the 2024 to 2025 TPAG, TPECG and CSBG, local authorities must:*

***either A.*** *pass on to those schools the CSBG funding at the same combined rate per place, or overall level (converted into an amount per SEND or AP place, except in the case of hospital education), as they allocated to those schools in 2024 to 2025 through the TPAG, TPECG and CSBG, ensuring that all those schools receive a funding allocation from the 2025 to 2026 CSBG on the basis of :*

- the full-year equivalent of the 2024 to 2025 CSBG, which they received plus the 2024 to 2025 TPAG and TPECG, and*
- five-twelfths of their 2024 to 2025 academic year place numbers and seven-twelfths of their 2025 to 2026 academic year place numbers*

***or, B*** *for those local authorities which do not already in 2024 to 2025 pass on this funding at the rates and place numbers used by the department to calculate their allocations, move to this approach for the CSBG in 2025 to 2026. However, to exercise this flexibility to move to this methodology, they must:"*

- *consult with those schools before deciding on that alternative methodology*
- *continue to pass on 100% of the total funding allocated in respect of those schools*

*For the NICs element of the 2025 to 2026 CSBG which does not have a 2024 to 2025 equivalent, local authorities can use the rates that the department has used for their allocations, as in option B above, or vary the amounts per place, following consultation with their schools. For allocations of funding in respect of the schools they currently maintain, academies they previously maintained, free schools located in their area and schools that provide hospital education, local authorities must comply with the following requirements in setting their local arrangements for passing on the 2025 to 2026 CSBG funding.*

*Once local authorities know their CSBG allocations, having determined their maintained schools' place numbers for academic year 2025 to 2026, and having reached agreement on their academies' and free schools' place numbers for academic year 2025 to 2026, and on the basis of the above funding rates, they should seek swiftly to confirm the allocations for individual special schools and AP schools, providing them with the earliest possible certainty over their 2025 to 2026 budgets.*

This new guidance, (only updated post the consultation process for 24/25 allocation and after the 24/25 decision had been reached), implies that LAs can only distribute the 25/26 CSBG under a different methodology to that used by DfE *if* such an approach was adopted in 24/25. By extension, this seems to indicate that since NCC have determined to distribute the funding in 24/25 using the DfE methodology, this approach must be retained for 25/26 with the exception of the new NIC element which could be treated discretely and utilise a different methodology.

The LA had anticipated that the allocation methodology used for 24/25 would have no bearing on approach for 25/26 having not received notification of updated guidance from DfE until after the 24/25 decision had been made. The LA therefore expected to be able to consult with schools again in 25/26 for the approach to be used in 25/26 without these restrictions.

The LA has contacted the DfE to confirm whether LAs have flexibility to allocate the 25/26 combined TPAG, TPECG and CSBG according to a different methodology if it used the DfE methodology in 24/25. If the DfE confirm this is not possible, there will only be the option to use a different methodology for the NIC element of the 25/26 combined grant and a consultation will only be required for this element.

Subject to the above, the LA proposes the following approach to 2025/26 CSBG allocation:



**Scenario 1:** where DfE confirm non NIC elements are locked into the DfE methodology as that what was used in 24/25:

- Not consult on the non NIC element of the grant and allocate it based on the DfE methodology;
- Consult on the NIC element of the grant based on the options of using DfE methodology or a proportion of top up rates across special and AP schools.

**Scenario 2:** where the DfE updates guidance confirming non NIC elements can be allocated differently to the DfE methodology where this was applied in 24/25:

- Consult on a single allocation methodology for the full, combined grant (inclusive of TPAG, TPECG, CSBG and NIC) based on the options of using DfE methodology or a proportion of top up rates across special and AP schools.

### **3. Teachers' Pension Employer Contribution Grant 2024 (TPECG24)<sup>3</sup>**

As with the Core Schools Budget Grant for 2024-25 above, the TPECG24 grant required consultation with affected special and AP schools prior to a decision on distribution.

The LA consulted to use replicate the methodology used by the ESFA in calculating funding for providers based on place funding of £595 per-place.

A consultation took place in July'24 and the responses were as follows:

Out of 19 schools/providers contacted:

<b>Response</b>	<b>Number of responses</b>	<b>% of responses</b>
<b>Yes</b>	<b>13</b>	<b>92.86</b>
<b>No</b>	<b>1</b>	<b>7.14</b>

The affected schools were informed of the outcome in July'24 and this grant has been allocated to those providers in line with the agreed methodology and grant conditions during 2024-25.

This grant will form part of a new single CSBG from April 2025 for special and AP schools.

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<sup>3</sup> [Teachers' pension employer contribution grant 2024 for schools, high needs settings and local authorities: 2024 to 2025 - GOV.UK](#)

#### **4. Teachers' Pay Additional Grant 2024-25<sup>4</sup>**

As with the CSBG and TPECG24 grants for 2024-25 above, the TPAG grant required consultation with affected special and AP schools prior to a decision on distribution. For this grant, a survey was sent to affected special and AP schools in September 2023 (as the grant had been introduced during 2023-24).

Although only 6 out of 18 providers contacted at that time responded and all that did were in favour of replicating the DfE/ESFA methodology; affected schools were notified of that outcome in October 2023.

Given that TPAG is specifically in relation to teacher funding and so is more clearly reflective of numbers, LA Officers agreed that consultation on principles of distribution had been undertaken recently (2023-24) and that replicating the DfE/ESFA methodology had not been controversial. Therefore, the decision was taken that this was sufficient to continue replicating the DfE/ESFA methodology of £446 per-place in 2024-25.

This grant will form part of a new single CSBG from April 2025 for special and AP schools.

#### **5. Early Years Budget Grant 2024-25<sup>5</sup>**

The EYBG grant has to be passed on fully to early years providers.

Local authorities are given flexibility in how they allocate funding locally, although they must adhere to the EYBG conditions of grant, and consultation with providers was encouraged (if possible) in the grant conditions.

Given the timescales involved, the LA consulted with the Early Years Consultative Group in October'24, and the group unanimously supported allocation using an hourly rate of £0.06 for its allocation with a further fixed amount of £26,301 allocated across the three maintained nursery schools based on hours, following the same principles previously used for distribution of the former EYTPAG in 2023-24 which had been distributed to providers using an hourly rate.

A paper was brought to Schools Forum in November 2024 setting out the proposed approach to allocation of the Early Years Budget Grant for 2024-25.

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<sup>4</sup> [Teachers' pay additional grant 2024 to 2025 - GOV.UK](#)

<sup>5</sup> [Early years budget grant \(EYBG\) 2024 to 2025 - GOV.UK](#)

The following points were raised and discussed at the Schools Forum meeting in November'24:

- A large proportion of school based early years provision did not employ teachers
- Concern was expressed that the approach could lower quality and standards across the board.
- Most of the representatives on the Early Years consultative group were not teacher-led nurseries, as this model was expensive to provide.
- The Chair queried as to who had authority to make the decision in this area. Officers confirmed that the decision lay with the Local Authority. There was no requirement to hold consultations, but this was done as a matter of principle.

Officers confirmed that feedback on the approach from Schools Forum would be considered before a final decision was taken. The LA's proposed methodology for EYBG was implemented and providers notified early February'25.

The hourly rates for the early years funding formula in 2025-26 include the additional teachers' pay costs from September 2024 (i.e. EYBG has been rolled into DSG allocations from April 2025).

## **6. Approach to future non-DSG consultations**

The additional non-DSG grants received during 2024-25 did not specifically require Schools Forum consultation or approval, but did recommend or require consultation with the affected schools/providers prior to the LA making decisions on their allocation methodologies.

Given the approach to funding in recent years by central Government, it is anticipated that there will be future grants received in-year by the LA for distribution that either require or recommend consultation with affected schools/providers prior to allocation. The LA is seeking a steer from Schools Forum on the best approaches and formats for such consultations to reach schools/ providers and, also, what Schools Forum's role should be in them.

The LA suggests the following questions for Schools Forum members to consider/discuss with respect to approaches to future non-DSG grant consultations:

- How should Norfolk's schools and early years providers be consulted on additional grant funding outside of the DSG, particularly when received in-year?
- What should Schools Forum's role be in such consultations?

- Should the autumn DSG consultation consider the principles of how such non-DSG grant funding is distributed, even if specific grants have not been announced, including views on whether or not funds are distributed based upon pupil numbers or via, for example, a different methodology that recognises differing needs/staff ratios (if there is a choice)?
- How and when should technical papers be utilised, including considering the merits and possible drawback, if different distribution methodologies are consulted on?

**Schools Forum is asked to:**

- **Consider, and provide feedback, on approaches to future consultations for non-DSG grants received by the LA in-year.**

SCHOOLS FORUM FORWARD PLAN – 2024/25 Academic Year

Item No: 9

I – Information & Discussion D- Decision

	Autumn Term			Spring Term			Summer Term	
<b>20/9/24</b> (Friday) 09:00 – 12:00	<b>September (Cranworth Room CH)</b>  Strategic Planning (inc. Local First Inclusion)  Provisional DSG Allocations for 2025/26 and Autumn DSG Consultation, including for Mainstream Schools' Formula  Early Years Funding Consultation  Annual Audit Report (NAS)	I  D  D  I	<b>31/01/25</b> (Friday)  09:00 – 12:00	<b>January (Green Room, Archive Centre, CH)</b>  Election of Chair/Vice Chair  Strategic Planning (inc. Local First Inclusion)  Proposed DSG Budget 2025/26 (inc. Block transfer)  Early Years Funding Formula  Pupil variations 2025/26	D  I  D  I  I	<b>09/05/25</b> (Friday)  09:00 – 12:00	<b>May (TBA)</b>  Strategic Planning (inc. Local First Inclusion)  Dedicated Schools Grant 2024/25 Outturn  Annual Audit Report (Norfolk Audit Service)  Norfolk Schools Forum Constitution & ways of working	I  I  I  D
<b>19/11/24</b> (Tues)  09:00 – 13:00	<b>November (Cranworth Room CH)</b>  Strategic Planning (inc.LFI)  DSG consultation outcomes and Schools Block transfer  EY Budget Grant update  De-delegation/Central Schools Services Block  Disapplication requests  Centrally retained items	I  D  I  D  D  D	<b>26/03/25</b> (Wed)  09:00 – 12:00	<b>March (Edwards Room CH)</b>  Next year's plan  Strategic Planning (inc. Local First Inclusion)  Final pupil variations (only if changed from January)  Norfolk Schools Forum Constitution & ways of working	I  I  I  D	<b>02/07/25</b> (Wednes day)  09:00 – 12:00	<b>July (Cranworth Room CH)</b>  Strategic Planning (inc. Local First Inclusion)  Updates on Scheme for Financing Schools (Financial Regulations)  Dedicated Schools Grant Consultation Preparation  Norfolk Schools Forum Constitution & ways of working	I  D  I  D
<b>06/12/24</b>  09:00 – 13:00	<b>December (Cranworth Room CH)</b>  Provisional DSG Allocations  Element 3  Notional SEN Allocation formula	I   D						

