

Norfolk Schools Forum

Minutes of the Meeting held on Tuesday 4 March 2025 at 9am on Microsoft Teams

Present	Organisation	Representing
Martin White (Chair)	Nebula Federation	Maintained Primary Governors
Stuart Allen	Mile Cross Primary School	Maintained Primary Schools
Stephen Beeson	Norwich Diocesan Board of Education	Diocese Representative
Steven Dewing	Sapientia Education Trust	Mainstream Academies
Glyn Hambling	Unity Education Trust	Alternative Provision Representative
Carole Jacques	Earlham Nursery School	Maintained Nursery Schools
Owen Jenkins	Broad Horizons Education Trust	Mainstream Academies
Joanne Philpott	Ormiston Academy Trust	Mainstream Academies
Sarah Porter	Unity Academy Trust	Mainstream Academies
Rachel Quick	The Wherry School	Special School Academies
Sarah Shirras	The Hive Federation	Maintained Primary Schools
Matthew Smith	Sheringham Woodfields School	Maintained Special Schools
Joanna Tuttle	Aylsham High School	Maintained Secondary Schools
Vicky Warnes	National Education Union	Joint Consultative Committee

Substitute Members Present	Organisation	Representing
Louise Clements McLeod	Halcyon Federation	Joint Consultative Committee

Also Present	Title
Michael Bateman	Assistant Director – SEND, Strategic Improvement and Early Effectiveness
Maisie Coldman	Committee Officer, Democratic Services
Dawn Filtness	DSG Strategic Lead
Samantha Fletcher	Assistant Director – Education Infrastructure and Partnerships
Jane Hayman	Director – SEND and Inclusion
Megan Hughes	Trainee Committee Officer, Democratic Services
Alison Toombs	Senior Advisor – Inclusion
James Wilson	Director for Sufficiency Planning and Education Strategy
Nicki Rider	Assistant Director- SEN and Alternative Provision Strategy and Provision

1. Welcome from the Chair

- 1.1 The Chair welcomed Forum Members to the Extraordinary Meeting.
- 1.2 The Chair welcomed Stuart Allen, as this was his first meeting as a Member of the Norfolk Schools Forum.

2. Apologies and substitutions

- 2.1 Apologies were received from Martin Brock, Peter Pazitka, and Bob Groome (substituted by Louise Clements McLeod).

3. Element 3 Funding Model

- 3.1 Officers introduced the report.
- 3.2 The following key elements were highlighted to the Schools Forum:

- The formulaic element accounted for only a small portion of the total Element 3 funding. Most of the funding would be distributed through a thorough analysis of student cohorts and schools' submissions of provision maps. It was important to note that the funding should not be viewed in isolation; schools that received little or no funding from the formulaic element could still qualify for Element 3 funding.
- Schools were asked to provide an overview of their Special Educational Needs and Disabilities (SEND) provision by submitting Identification of Needs Descriptors in Educational Settings (INDES) and graduated provision maps across cohorts. Although this was acknowledged as a significant amount of work, it was emphasised that doing so would provide valuable context to address any shortcomings in the formula being used.
- Allocations for the formulaic funding for 2025-26 had been calculated using a formula that mirrored the National Funding Formula through the Authority Proforma Tool, which supported the LA's plan to move away from block transfers in the coming years. It was noted that any deviations from the National Funding Formula could complicate future efforts to achieve this transition.
- Communicating the funding allocation posed a challenge. It was suggested that postponing all communication until Easter would facilitate a clearer presentation of the information.
- The initial draft communications shared with Forum Members needed refinement, especially for maintained schools that lacked the infrastructure of academies. Efforts were underway to provide tailored advice for individual maintained schools.

3.3 The following points were raised and discussed:

- The Vice-Chair questioned whether the Core Schools Budget Grant (CSBG) consultation and its decisions would be taken into account when making this decision. The impact on special schools, mainstream schools, and alternative provision in relation to Band 4B funding was emphasised. Officers clarified that the two topics need to be treated separately for the time being. This was because the CSBG consultation only related to special schools and alternative provision, whilst Element 3 funding related only to mainstream schools. The Vice-Chair expressed concern that for special schools and alternative provision, these funding changes could result in a dual impact. Officers acknowledged that trusts operating both special schools and alternative provision would be affected; however, it was emphasised that these were separate issues. The Vice-Chair agreed that they were but reiterated that they should not be viewed in isolation.
- A Forum Member sought clarification on whether Enhanced SEND Provisions (ESPs) were excluded from the payment but still included in the overall process, and whether cohort funding was roughly equivalent funding to what was previously known as Bands 4B and 4C. Officers confirmed that cohort funding was roughly equivalent to Bands 4B and 4C and that ESPs still existed. It was highlighted that ESPs should be included in the Graduated Provision Maps submitted by schools and they would factor into funding considerations. Schools with a high level of formula funding were expected to allocate those funds for SEN provision, whether that be ESPs or other forms of support.
- A Forum Member acknowledged that there was not a perfect solution moving forward. It was highlighted that the original formulaic approach would be the most sensible approach to move away from the need for a 1.5% block transfer. It was further noted that communications had already been sent out indicating this direction and any changes would add complication.
- A Forum Member expressed support and highlighted the importance of considering the funding model within a broader context, as well as ensuring the second part of Element 3 reflected overall school provision. However, concern was raised about the unclear details related to Element 3, as there was a fear that schools could be

disappointed when allocations were announced.

- A Forum Member questioned the language used regarding a "cliff edge" in the future if a formulaic approach was not adopted. Further clarification was sought on the reasoning behind this. Officers explained that if the National Funding Formula was not followed this year and the block transfer was removed next year, schools with zero funding would face the similar issues at that point.
- The Chair shared concerns regarding the Element 3 Formula Funding approach and suggested that a funding approach excluding the Minimum Funding Guarantee and Minimum Per Pupil Level (MPPL) would be fairer. The MFG and MPPL were provided to schools for a reason, and thus, the Chair did not consider it to be extra money or that the school was double funded. It was highlighted that although the funding represented only a small portion of the Element 3 funding, there was concern that the system could not compensate for the resulting losses. Officers acknowledged that schools would face uncertainty until Easter. However, assurances were made that if schools could prove a legitimate need, funding would be provided, even if it risked overspending. Ongoing dialogue would be encouraged to seek efficient solutions.
- A Forum Member questioned why all of the 1.5% block transfer related to Element 3 and not other aspects of the High Needs Block. Officers responded by explaining that significant investment had been made in mainstream schools through the High Needs Block. With the money no longer coming through from the block transfer and was back in mainstream schools, the money would no longer be available within the High Needs Block to redistribute. It was emphasised that while Element 3 funding remained at a high level, but that it was not possible to fund the mainstream schools, effectively, twice.
- A Forum Member noted that a block transfer was utilised before Element 3 and highlighted concern that independent provisions would still receive a substantial amount of funding, and not equally receive the impact of the funding changes. They raised uncertainty on why the Element 3 funding, which was previously in I03 as the income line, was now being integrated into the main budget. While it was acknowledged that next year's communication would clarify this situation, there was still a concern about the complexity of the system and schools' understanding of the changes. Additionally, doubts were raised about whether schools had requested the funding that was actually needed, rather than what schools thought they could get. These factors made it challenging for the Forum Member to support the LA proposal. Officers clarified that the funding was Element 3 funding and that it would show on the I03 budget line on the budget share tracker, and that it is separate from the budget share. It was also highlighted that an Authority Proforma Tool (APT) was being used to closely mirror what would have happened if there was not a block transfer from September.
- A Forum Member raised concern that protections would kick in at a higher level and if it was I03, these protections would not count. An example was used of minimum per-pupil funding being applied at a higher level than the Element 3 funding, which would effectively eliminate it, with no guarantee that other processes would compensate for this loss. Officers clarified that under the formulaic approach, schools with a zero allocation would not see an element 3 element on their budget tracker, but it did not mean protections have been removed. Instead, funding will continue to be allocated based on cohort needs, as assessed through ongoing submissions and reviews.
- A Forum Member supported the principle of ensuring funding directly met children's needs and emphasised the importance of scrutiny in the allocation process. However, concern was raised when it was suggested by multi-academy trusts in the previous meeting that it was not required for them to demonstrate how the Element 3 funding was being used. A particular concern was that funding would be pooled centrally within the

trusts rather than being directed back to the individual schools that applied for it. It was queried whether this issue had been addressed to ensure that children were ultimately receiving the allocated funding. Officers confirmed that a moderation and external assurance process would apply to all schools and academies. Concerns about audits and external oversight were acknowledged, and specifics of this assurance process were still being discussed.

- A Forum Member highlighted a perceived difference in opinion between academy and maintained school representatives. Clarification was sought on whether there was any difference in the calculation method for funding between the two and whether the way maintained school's finances were presented, along with council mechanisms for financial management, contributed to this perception. Officers confirmed that there was no difference in how the funding was calculated or presented between the two and that the budget share information was structured the same way for both. It was highlighted that both would receive zero allocation through this route and that it came down to the individual situation of the schools and academies and the protections in place for them.
- A Forum Member noted that within an academy trust, it would be unlikely that all schools would receive zero funding, allowing for a broader perspective on the benefits and drawbacks of the system. In contrast, standalone maintained schools would only see their individual allocation, which would make it harder to grasp the overall system and mitigate the impact.
- A Forum Member emphasised that the communication should focus on the start of the process, particularly regarding the needs analysis and moderation, to ensure needs for all students were addressed effectively.
- The Vice-Chair expressed uncertainty about whether waiting until April would be beneficial. However, it was emphasised that sharing consistent information was crucial to avoid confusion and reassure headteachers and governors about the process moving forward.
- Glyn Hambling left the meeting at 09:59am.
- A Forum Member highlighted that communication regarding Element 3 funding should be more specific, as there was confusion about how much money should be allocated in budgets. The importance of finance officers being well-informed with clear guidance was emphasised so they can properly guide schools in budgeting. It was suggested that all communication should be presented with the bigger picture in mind, to make the conversation around budgeting easier for schools.
- A Forum Member commented on the importance of sending out communications as soon as possible, particularly due to the potential lack of budgeting experience among maintained schools. The urgency for clear funding information was highlighted, especially as it related to ongoing restructures and the schools' ability to plan for essential services such as wraparound care and free school meals. Officers acknowledged the need for clear and detailed advice. However, there was uncertainty about whether releasing the formulaic funding information at this time would be beneficial since the final outcomes for all schools would not be known until Easter.
- A Forum Member further emphasised resistance around parts of communications being released as it could create a vacuum in understanding the bigger picture.
- Several Forum Members asked for further clarification on whether the indicated Easter timeframe referred to before, during or after the Easter holidays. It was enquired whether additional resources could be allocated to help distribute the information sooner. Officers stated that it would be more beneficial to consult with their colleagues and provide an

answer after the meeting. However, there was a preference to wait until after the Easter holidays to ensure a thorough process and to avoid providing any information that might not be helpful during the holidays. A Forum Member expressed dissatisfaction with the response, stating that communications should be sent out before the Easter holidays. This was particularly important for maintained schools, as the budget planning process was currently ongoing.

- The Chair asked that clear instructions be provided to finance support officers attending the budget-setting workshop the next day.
- Officers summarised the various viewpoints that were expressed on the proposed options. It was noted that there was not a full consensus on whether to proceed with the LA proposal or an alternative approach. While the Chair himself expressed reservations about moving forward with the original approach, on asking the Forum whether Members shared this view, no further objections to the LA proposal were expressed.
- As it was noted that there was no consensus amongst Forum Members to share partial or complete information, officers expressed a preference for releasing all information at once.
- Officers confirmed that due to the scale of the task, publication before the Easter holidays could not be guaranteed, however the team were working as quickly as possible and would update the Forum on the timeline.

3.4 Having considered and commented on the report accordingly, the Norfolk Schools Forum **RESOLVED to:**

- 1) Move forward with the LA proposal to distribute the c. £9.7m Element 3 Formula Funding via the National Funding Formula for Norfolk.
- 2) Ask volunteers including the Maintained Primary representatives and Owen Jenkins to proofread communications.

There being no other business, the meeting closed at 10:20

**Martin White, Chair
Norfolk Schools Forum**



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