

Norfolk Schools Forum

Meeting Agenda

Date: **Wednesday 2 July 2025**
 Time: **9am**
 Venue: **Cranworth Room, County Hall, Martineau Lane,
 Norwich, NR1 2UA**

Membership	Organisation	Representing
Martin White (Chair)	Nebula Federation	Maintained Primary Schools
Stuart Allen	Mile Cross Primary School	Maintained Primary Schools
Helen Bates	Roman Catholic Church Diocese	Diocese Representative
Stephen Beeson	Norwich Diocesan Board of Education	Diocese Representative
Martin Colbourne	City College Norwich	16-19 Representative
David Cousins	Eastern Multi-Academy Trust	Mainstream Academies
Steven Dewing	Sapientia Education Trust	Mainstream Academies
Lacey Douglass	Freelance Early Years Advisor	Early Years Representative
Bob Groome	National Education Union	School Unions
Glyn Hambling	Unity Education Trust	Alternative Provision Representative
Carole Jacques	Earlham Nursery School	Maintained Nursery Schools
Owen Jenkins	Broad Horizons Education Trust	Mainstream Academies
Adrian Lincoln	NASUWT	School Unions
Peter Pazitka	St. John the Baptist Multi Academy Trust	Mainstream Academies
Joanne Philpott	Ormiston 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
Daniel Thrower	Wensum Academy Trust	Mainstream Academies
Joanna Tuttle	Aylsham High School	Maintained Secondary Schools
Vacancy		Mainstream Academies
Vacancy		Mainstream Academies

Officers:

Martin Brock	Accountant (Schools, Special Educational Needs and Early Years)
John Crowley	Assistant Director – Intelligence and Education Sufficiency
Samantha Fletcher	Assistant Director – Education Strategy
Dawn Fowler	AD LFI Programme and DSG Strategic Lead
Jane Hayman	Director of Belonging and Inclusion
Nicki Rider	Assistant Director – SEN and Alternative Provision Strategy and Sufficiency
Sara Tough OBE	Executive Director of Children's Services
James Wilson	Director of Strategy and Outcomes

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

Laine Tisdall on 01603 222 053
 or email committees@norfolk.gov.uk

Agenda

1. **Welcome from the Chair**
0900 to 0905
2. **Apologies for Absence**
0905 to 0910
3. **Minutes**
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0910 to 0920
4. **Matters Arising**
 - **Summary of Actions from May 2025 Schools Forum** **Page 16**
0920 to 0930
5. **Strategic Planning: 2025 Spending Review & National Announcements** **Page 19**
0930 to 1000 (Information and Discussion)
6. **DSG Consultation Preparation 2026-27** **Page 33**
1000 to 1045 (Information and Discussion)
7. **Update to Scheme for Financing Schools** **Page 44**
1045 to 1100 (Information and Discussion)
- Coffee Break**
8. **Norfolk Schools Forum Constitution and Ways of Working** **Page 49**
1115 to 1200 (Decision)
9. **Forward Work Plan** **Page 67**
1200 to 1210 (Information and Discussion)
10. **Any Other Business**
1210 to 1220
11. **Date of Next Meeting**

Martin White
Chair, Norfolk Schools Forum

Date Agenda Published: Wednesday 25 June 2025



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Norfolk Schools Forum Minutes

Minutes of the Meeting held on Friday 9 May 2025 at 9am, Cranworth Room, County Hall

Present

Martin White (Chair)
Stuart Allen
Stephen Beeson
David Cousins
Steven Dewing
Bob Groome
Glyn Hambling
Carole Jacques
Owen Jenkins
Peter Pazitka
Joanne Philpott
Sarah Porter
Rachel Quick
Sarah Shirras
Matthew Smith
Daniel Thrower
Joanna Tuttle

Organisation

Nebula Federation
Mile Cross Primary School
Norwich Diocesan Board of Education
Eastern Multi-Academy Trust
Sapientia Education Trust
National Education Union
Unity Education Trust
Earlham Nursery School
Broad Horizons Education Trust
St. John the Baptist Catholic MAT
Ormiston Academy Trust
Unity Schools Partnership
The Wherry School
The Hive Federation
Sheringham Woodfields School
Wensum Academy Trust
Aylsham High School

Representing

Maintained Primary Schools
Maintained Primary Schools
Diocese Representative
Mainstream Academies
Mainstream Academies
Joint Consultative Committee
Alternative Provision Representative
Maintained Nursery Schools
Mainstream Academies
Mainstream Academies
Mainstream Academies
Mainstream Academies
Mainstream Academies
Special School Academy
Maintained Primary Schools
Maintained Special Schools
Mainstream Academies
Maintained Secondary Schools

Substitutes Present

Karen McIntosh for Martin Colbourne

Organisation

City College Norwich

Representing

16-19 Representative

Also Present

Michael Bateman
Martin Brock
John Crowley
Dawn Fowler
Jane Hayman
Jonathan Nice
David Oldham
Nicki Rider
Adrian Thompson
Laine Tisdall
Alison Toombs
Joshua Warnes
James Wilson

Title

Assistant Director – SEND, Strategic Improvement and Early Effectiveness
Accountant – Schools, SEN, and Early Years
Assistant Director – Intelligence and Education Sufficiency
Dedicated Schools Grant Strategic Lead
Director – SEND and Inclusion
Senior Advisor – Teaching and Learning
Senior Advisor - Intervention
Assistant Director – SEN, Alternative Provision and Sufficiency
Assistant Director of Finance (Audit)
Committee Officer, Democratic Services
Senior Advisor – High Needs SEND Operations
Internal Audit Manager
Director of Sufficiency Planning and Education Strategy

1. Welcome from the Chair

- 1.1 The Chair welcomed Forum Members and officers to the meeting.
- 1.2 David Cousins was welcomed to the Schools Forum, as this was his first meeting as a Mainstream Academy Representative
- 1.3 Sarah Porter was welcomed back to the Schools Forum, as she was recently re-elected as a Mainstream Academy Representative

2. Apologies and substitutions

- 2.1 Apologies were received from Martin Colbourne (Karen McIntosh substituting), Lacey Douglass, Vicky Warnes, Samantha Fletcher, and Sara Tough OBE.

3. Minutes

- 3.1 The minutes of the extraordinary meeting held on Tuesday 4 March 2025 were approved as an accurate record of proceedings.
- 3.2 The minutes of the meeting held on Wednesday 26 March 2025 were approved as an accurate record of proceedings.

4. Matters Arising

- 4.1 The Norfolk Schools Forum **RESOLVED** to **NOTE** the Summary of Actions from the March 2025 meeting.

5. Strategic Planning (including Local First Inclusion)

- 5.1 Officers introduced the report, which focussed on the projects being delivered as part of the Local First Inclusion (LFI) programme, the impact and setting out a period of reflection to ensure that the programme governance was working for its intended purpose of supporting and challenging that delivery in the short, medium and long term.
- 5.2 The following key elements were highlighted to the Schools Forum:
 - Over the past couple of weeks, there had been a major focus on clarifying Element 3 funding for mainstream schools from September 2025. Around 30 to 40 schools remained in dialogue with Children's Services regarding this issue, with this number expected to decrease to a handful of outstanding establishments by mid-May.
 - A briefing for Members was planned for next week, providing a summary of the work undertaken to date.
 - There were a number of similarities between the report and the quarterly LFI update report submitted to the Scrutiny Committee at Norfolk County Council. Both papers were in the public domain but focussed on different areas of the programme.
 - The forward work programme for the LFI Reference Group was highlighted, with it being felt that this arrangement had proven successful over the past 12 months.. There was a likelihood that discussions at future Reference Group meetings would lead to co-produced work filtering down for consideration at the Schools Forum.

- An updated LFI plan was submitted to the Department for Education (DfE) earlier in the week, including a high-level summary of data which was previously considered at the March 2025 meeting of the Scrutiny Committee. Norfolk County Council remained part of the Safety Valve programme along with other local authorities in England. Other local authorities in the programme in a similar situation to Norfolk were also contacted by the DfE and invited to submit revised plans in April 2025. It was now known that no further Safety Valve deals were forthcoming from the Government, however, reforms to the Special Educational Needs and Disabilities (SEND) system were expected to be announced in summer 2025.
- A high-level timeline regarding the opening of school-led Alternative Provision (AP) centres (secondary Social, Emotional and Mental Health Specialist Resource Bases) was set out in the report. It was stressed that work was already underway through the programme to deliver the capital development required to make changes to mainstream provision to enable this work.
- It was noted there was a perception that much of the work undertaken on AP was around the ten proposed AP centres, but in actuality a significant quantity of time was being spent on work around targeted early intervention, outreach, and the tier model.

5.3 The following points were raised and discussed:

- The Chair requested further details regarding the substantial changes to cohort funding. An officer stated that if there was a situation where a child was receiving funding to attend a certain school and then attended a different establishment, there was a need to make changes to a school's provision.
- Sarah Porter queried if the cohort funding changes accounted for current consultations with children holding an Education, Health, and Care Plan (EHCP). It was confirmed that officers were working closely with the High Needs Team to ensure information on EHCP placements were up to date.
- Stephen Beeson expressed concern that there was no comparison with previous iterations of the plan in the report, making it difficult to determine success, progress, and potential setbacks in the LFI programme. Officers stated that multiple LFI meetings were held at Norfolk County Council each term, considering different aspects of the programme. Given the sheer amount of information and metrics available to officers, there was a need to strike the right balance of content in the reports going to the Schools Forum.
- Owen Jenkins requested clarity regarding the funding of LFI initiatives, to scrutinise if they were providing value for money. An officer stated that data on the financial impact of LFI could be provided and summarised in a future report.
- Bob Groome commented that while the opening of Specialist Resource Bases (SRBs) was a success worth celebrating, there was concern that the closure of SEND units and teaching assistants being made redundant were not being reported. It was queried if a request for further funding was made to the DfE when the revised plan was submitted in April 2025. Officers confirmed that the local authority always advocated for further funding across the system, particularly across the High Needs Block and mainstream education. It was acknowledged that while the deficit in the High Needs Block was a major issue, which needed to be resolved for the LFI programme to work, increased funding in the overall system was paramount. The aim of the report was to illustrate and celebrate success stories within LFI, to build parental confidence in the SEND system and improve morale within. It was acknowledged while there were green shoots of positivity, the LFI programme, overall, was not currently on track.

- Stuart Allen suggested a report be brought to a future Schools Forum meeting considering the impact of SRBs, illustrating how much provision currently existed in the system and what was planned to be brought online in the future. This would provide a potential measure of success within the LFI programme.
- The Vice-Chair commented that the submission of a revised plan to the DfE provided an opportunity to reconsider the metrics, depending on whether the plan was accepted or rejected.
- The Chair requested clarity regarding recommendation two in the report, relating to the “leadership role that Schools Forum could play in helping the local authority to celebrate the success of the programme.” Officers stated the assumption was that the Forum Members would consider the impact of whole school funding, SEND funding and LFI funding and report back to constituents. The aim was to achieve a positive discussion and build upon best practices across the system. Forum Members had a position where success stories could be reported and the impact highlighted.
- The Chair commented there had been previous attempts to communicate summaries of Schools Forum meetings through briefing papers, however, receiving feedback from constituents remained an issue. It was noted it was particularly challenging for Mainstream Academy Representatives to communicate information to academies that were not currently represented on the Schools Forum.
- Bob Groome highlighted the Facebook group SEND Reform England as a potential option to overcome barriers to communication of the LFI programme. Officers stated that the Comms Team at Norfolk County Council were happy to speak with Forum Members, which could potentially drive engagement across the system.
- Stuart Allen suggested organising a SEND conference in Norfolk during 2026, providing Forum Members with an opportunity to showcase and highlight success stories across the sector. It was noted that a previous event was organised by the LFI Executive Board. If another was organised, it was paramount to build upon the momentum afterwards rather than treat it as a one-and-done event.
- Carole Jacques expressed concern that assisting the local authority in celebrating the success stories of the LFI programme was not part of the School Forum Member role. It was felt that there were other establishments such as the Zone Inclusion Partnerships (ZIPs) which were a more effective outlet for this, with the Schools Forum focussing on financial aspects of the system. Officers acknowledged this viewpoint.
- Joanne Philpott stated there appeared to be confusion regarding the remit of the Schools Forum. Forum Members held a civic role as school and education leaders to give balanced accounts and appropriate advocacy regarding positive trends in outcome data, providing cautious optimism to the wider education system.
- Sarah Shirras noted that there were several headteachers across Norfolk who were unsure of the content being discussed by the Schools Forum but had expressed gratitude to Forum Members for representing their interests. There were other forums across Norfolk where schools regularly interacted with each other.
- The Chair requested clarification of the reporting order between Schools Forum, the LFI Reference Group, and the Scrutiny Committee. An officer stated that there was more focus on ensuring clarity of information between each meeting rather than establishing a strict order of progress. It was suggested that the Schools Forum could play a role in identifying indicators which were off-track, or topics which were not covered by other groups, which would enable the local authority to take remedial action and report back progress at future meetings.

- The Vice-Chair stated that the LFI report at the end of the current academic year should be produced in such a way to enable detailed discussions towards the start of the next academic year. Officers commented that this timescale would fit the annual process of refresh. It was noted that the expected SEND reforms from the government would involve a stocktake across all LFI programmes.
- Joanna Tuttle requested assurance that the LFI Reference Group had the right membership consistency to help co-production of projects. There was a potential need to be more specific regarding attendance at individual meetings, to ensure rich and relevant feedback was received. Officers acknowledged the need to ensure a broad and collective membership mix at Reference Group meetings. If the Schools Forum had oversight of the Reference Group forward work programme, this would build confidence in the co-production element.
- Joanne Philpott commented that the report was appreciated but sought further assurances on the pace of delivery of the new Tier 2 provision, the financial impact, and what work was being undertaken around future projections. Officers confirmed there had been engagement with multi-academy trust leadership and other stakeholders in the system over the past month, with significant improvements noted towards addressing the pace issue. It was hoped that further improvement could be illustrated at the July 2025 meeting of the Schools Forum. It was acknowledged there were a range of issues around timescales, due to a variety of factors. Confidence was expressed that there was sound logic behind the AP centres and the overall strategy.
- Stuart Allen queried if AP model comparisons had been made between Norfolk and other local authorities. Officers stated they had examined other local authorities to see how they had interpreted DfE guidelines. It was noted that Norfolk still had more exclusions per head of population compared to most other areas in England. There was optimism that this trend would reverse over the next couple of years. The Vice-Chair commented that every single AP model was different. The only accurate way to judge outcomes was to use Norfolk's own key performance indicators (KPIs).
- The Vice-Chair stated he was happy to see that the Educational Psychology Service was benefiting from increased direct funding from Norfolk County Council, as this would help with framing the success stories of the LFI programme.
- The Vice-Chair commented that there were initial positive signs of systemwide change towards tackling exclusions.
- Bob Groome outlined an AP model used in Southend-on-Sea which targeted Key Stage 4 students who struggled with academic subjects. This model was based around hands-on intervention with work experience and college attendance. Students in the model received a National Vocational Qualification (NVQ) assessment at the end of their tenure, with strong results seen from this model over the years. It was suggested that this model be examined in Norfolk, as it had assisted students towards practical qualifications and further employment prospects. An officer stated that the LFI Reference Group could examine post-16 education on their forward work programme.
- The Chair thanked Michael Bateman for all of his work and effort supporting the Norfolk Schools Forum over many years and for his commitment to supporting vulnerable young people in the county, as this was his final day at Norfolk County Council.

5.4 Having considered and commented accordingly, the Norfolk Schools Forum **RESOLVED** to **PROVIDE** feedback on the following:

1. Progress of the LFI programme
2. The leadership role that Schools Forum members could play in helping the local authority to celebrate the success of the programme and, in turn, increasing countywide consistency of inclusivity in mainstream schools in Norfolk

6. Update on Element 3 Funding Assurance

6.1 Officers introduced the report, which provided an update on the consideration of how assurance was currently provided in relation to the appropriate use of Element 3 funds within in Norfolk, to address concerns raised following previous discussions at Schools Forum meetings earlier in 2025.

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

- Guidance received from the DfE made it clear that the local authority could expect schools and academies to provide evidence of how Element 3 funding was being used, both in advance of allocation and through review processes, such as EHCP annual reviews. The guidance was applicable to both schools and academies. It was highlighted that the onus was on the local authority to determine the appropriate level of funding.
- The Section 151 officer at Norfolk County Council could seek assurance that High Needs Block funding was being used for correct purposes, rather than as general school funding.
- The DfE advised that while local authorities could not undertake academy audits by themselves, the local authority did have the right to request evidence.
- No additional Element 3 audits were proposed, as the changes implemented meant that officers had improved processes in place towards decision making and the allocation of funds and the review of provision in schools and academies on an ongoing basis. Norfolk County Council was of the view that these processes would provide greater assurance but emphasised the need for open and transparent engagement and dialogue from both maintained schools and academies alike.

6.3 The following points were raised and discussed:

- Owen Jenkins commented that while it appeared the processes around Element 3 assurance were moving in the right direction, there was a need for clarity around upfront and ongoing assurance, particularly around EHCP reviews.
- Stephen Beeson stated that the definition of “appropriate evidence” had to be clarified, as there was a need to make it clear to schools that this was not an audit process. Officers agreed to consider the definition if possible, however, the view of the DfE was that the local authority could set its own definition of appropriate evidence. The DfE did not provide a template for appropriate evidence. Officers agreed to further dialogue with representatives on this issue.

- The Chair queried if officers were satisfied that a robust system was in place to monitor how Element 3 funding was being spent in Norfolk, and questioned what actions would be taken if something unsatisfactory was discovered. Officers stated the robust system was a work in progress at present, with the data gathering recently undertaken and system changes underway. If concerns were raised, initial conversations around provision not meeting need or being inefficient would take place between schools and the dedicated team. Solutions would be sought through these discussions. It was hoped that the system in place meant that issues did not escalate in size.
- Stuart Allen asked if there was a mechanism for schools to disagree with and argue against a local authority funding decision. An officer confirmed there was an option of last resort for schools to argue their case with the DfE. However, the DfE's view was that a school was expected to have exhausted all other options before escalating their case to ministers and the Secretary of State for Education.
- Stuart Allen thanked officers for their work on the new processes, suggesting that an update report be brought back to the Schools Forum in 18 months' time. The Chair suggested an update for the Spring 2026 meeting of the Schools Forum.
- Joanna Tuttle commented that there needed to be confidence in the system that schools were being held to account, with the local authority having the ability to decide if Element 3 funding was necessary.
- Steven Dewing noted that academies received more audits than maintained schools, often being audited multiple times in an academic year.
- Owen Jenkins stated it was paramount to understand the assurance process. Concern was expressed regarding a lack of focus on Enhanced SEND Provision (ESP), with it appearing that the reporting mechanism was due to cease in the near future. An officer stated that the team now has a good evidence base on what good practice is with regards to small group provision in mainstream settings as part of LFI project 2. There was no intention to cease reporting. Communications on this issue were due to be sent out shortly.
- The Chair suggested that ESPs be considered at a future meeting of the LFI Reference Group, looking at equality issues. Officers agreed to consider further.

6.4 Having considered and commented accordingly, the Norfolk Schools Forum **RESOLVED** to **NOTE** the report.

7. DSG Final Outturn and Balances 2024-25

7.1 Officers introduced the report, which presented the final Dedicated Schools Grant (DSG) outturn position for all four blocks within the DSG at the end of the 2024-25 financial year. The final position was due to be approved by Norfolk County Council's Cabinet at their June 2025 meeting.

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

- The overall DSG outturn position for all four blocks was a £55.87m overspend for 2024-25, occurring almost exclusively in the High Needs Block.
- An overspend of £0.031m was recorded with the Central Schools Services Block, while underspends of £0.109m and £1.030m occurred within the Centrally Maintained Schools Block and Early Years Block, respectively.
- The 2024-25 financial year commenced with a substantial DSG deficit of £81.5m. As planned, Norfolk County Council made a £5.5m contribution. However, no further Safety Valve funding was received from the DfE by the end of March 2025. Further funding announcements were awaited.
- The DSG deficit stood at just under £132m by the end of 2024-25.
- There was a reduction in Maintained Schools Balances from £14.8m to £13.9m during the course of 2024-25.

- Within the Centrally Maintained Schools Block, a Growth Fund of £1.25m was established and £0.918m was de-delegated to be held centrally. Both of these actions were previously agreed by the Schools Forum.
- Due to increased maternity demands, there had been a de-delegated overspend by the end of 2024-25.
- Marsham Primary School closed during 2024-25. Funds from this school were not required to be redistributed.
- The Central School Services Block overspend of £0.031m was largely caused by the cost of licences being higher than first estimated. When the budget was set, the DfE had not yet provided the costs, which came in higher than estimated.
- The High Needs Block outturn position had reduced by £2.2m since it was last reported to the Schools Forum in March 2025. This was largely due to a reduction in the independent placements cost following final information regarding placements, and Core School Budget Grant and Teachers Pension Grant being set aside for use on independent school fees which were credited back into costs paid by the DSG at the end of 2024-25.
- A £39m High Needs Block deficit was originally budgeted for 2024-25, versus the actual outturn position of a £55.87m deficit. The largest proportion of the variance was for independent special school placements with an overspend of £10.4m. There were 1,054 independent placements in 2024-25, as opposed to the 986 budgeted, a variance of 68.
- Another proportion of the High Needs Block variance was a £5.7m overspend on Section 19 places, due to an increase in demand by 187 places above what had been budgeted.
- The 1.03m underspend in the Early Needs Block was due to a final adjustment to the 2023-24 figures of £470,000, caused by an overestimate of the 2023-24 clawback. In addition, there was an underspend of £563,000 against the final expected position for 2024-25. A clawback of £2.35m was estimated to take place later in 2025, based on final data from the January 2025 census. The DfE were to produce a final DSG adjustment, which was expected to be known in July 2025.
- The in-year underspend in the Early Needs Block was largely attributable to an underspend on the SEN Inclusion Fund, caused by lower than anticipated demand following placement expansion and maximised use of the Disability Access Fund grant.

7.3 The following points were raised and discussed:

- Steven Dewing queried as to how there had been increased expenditure on Section 19 places when exclusion data pointed to a downward trend in Norfolk. Officers highlighted a combination of factors. The 2024-25 budget was set based on information known in December 2023. After this, there was an increase in exclusions at the same time that AP places were saturated. At the start of 2024-25, the number of children not on a school roll was significantly higher than budgeted, with numbers continuing to increase over the summer. This had a knock-on effect on the budget. It was noted that exclusion numbers and children not on a school roll fluctuated over the year, but the saturation of AP places had contributed to the increased expenditure.
- Matthew Smith asked if the adjustments around maternity and Shared Parental Leave contributions for 2025-26 would eliminate the overspend on de-delegated staffing costs seen in 2024-25. Officers expressed hope this would be the case, noting there had been issues forecasting these elements in past years. A change in methodology was expected to resolve these issues for 2025-26.

- Matthew Smith questioned if there were any other payments withheld in 2024-25. An officer stated the £10m in withheld Safety Valve payments consisted of £4m from 2023-4 and £6m from 2024-25. It was noted that the DfE's intention was to restart safety valve payments in 2025, but there was no clarity on the timescale or how this would be achieved at present. Once information was available, officers intended to build this into future financial projections.
- Matthew Smith requested a breakdown regarding High Needs Inclusion Infrastructure sum, which had amassed to over £6m. Officers agreed to revisit the figures and provide a breakdown at a future Schools Forum meeting. It was noted that a large proportion of this sum was through Schools and Community Teams.
- The Vice-Chair stated that while a strategy regarding the use of independent special schools existed, an overspend of 23% was still recorded. It was queried if there were specific aims built into the budget to achieve the targets within the strategy. Officers stated that assumptions regarding the cumulative effect of the LFI programme were built into the budget, but these had not yet occurred. Demand trends were not following the modelling presently. It was hoped that the Government's expected SEND reforms would provide support in this area. Officers confirmed that a different approach to assumptions was being taken for the 2025-26 budget.
- Stuart Allen expressed concern regarding the overspend in independent special school placements, as 68 extra children had effectively cost the local authority over £10m. Officers clarified that a reduction in places was built into the 2024-25 budget, meaning that the overspend related to the variance in places. It was noted that the cost of places fluctuated over the year, which was a challenge faced by the local authority.
- Rachel Quick queried if it was known which types of independent schools the High Needs Block was being spent on, and whether the provision for the additional 68 places was the root cause of lag within the LFI programme. Officers stated that a breakdown could be provided to a future Schools Forum meeting or via a briefing.
- The Chair commented that the cumulative High Needs Block deficit was reaching a point of no return, as the statutory override was due to cease before the effects of the LFI programme were felt. Officers acknowledged that the statutory override was due to end in March 2026. It was unlikely that any national SEND reforms would have any noticeable effect by this point. Conversations between the Government and local authorities were expected later in the year, but it was uncertain as to what actions could be expected. It was stressed that this was a pressing national issue for the Government, as several local authorities were in the same scenario as Norfolk. Change to the system was inevitable.
- Owen Jenkins commented that the statutory override would cease at the same time when the 2025-26 accounts were audited. Officers acknowledged this reality.
- Peter Pazitka queried if the underspend on SEN Inclusion Fund (SENIF) in the Early Years Block could be utilised in the sector to assist early intervention aims. An officer stated that the SENIF budget was difficult to predict due to the expansion in entitlements for working families. Funding was set at a 3% level, but this was a new and evolving marketplace needing to be kept under review. There were concerns that the under-3 cohort was becoming more skewed towards working families rather than disadvantaged families. There was a need to work with providers to encourage more take up from disadvantaged families in the under-3 cohort. Investigations had taken place to see if the underspend could be reallocated, however, the regulations were clear there was no flexibility in this area due to the DSG being in an overall deficit position.
- Steven Dewing commented that the Government's introduction of free childcare would continue to skew the under-3 cohort more towards working families. It was queried if there was any scope to use the SEN Inclusion Fund (SENIF) to target families and children in different settings as, at present, the reforms were effectively creating a two-tier early years system across the country. An officer stated this would not be in line with national funding guidance.

- Carole Jacques queried if there was scope for looking at a higher level for SENIF funding for children who could require an EHCP, as at present the level of funding per term was low and the process for a child to receive any information could take a significant amount of time. Officers stated there were numerous factors to consider and would explore options as part of consultation on a new formula.

7.4 Having considered and commented accordingly, the Norfolk Schools Forum **RESOLVED** to **NOTE** the report.

8. National Insurance Contributions Grants 2025-26

8.1 Officers introduced the report, which set out information regarding the National Insurance Contributions (NIC) Grants for the 2025-26 financial year

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

- The Government announced additional NIC grants for the 2025-26 financial year, to assist schools and high needs settings with increased NI costs.
- The DfE provided mainstream schools and academies with a calculator tool towards their rates.
- Early Year grants were to be provided to the local authority by the DfE in September 2025, then subsequently passed onto providers based on local Part Time Equivalent (PTE) data.
- The NIC grant for High Needs Settings was to be rolled into the Core Schools Budget Grant. With regard to distributing the funding, a consultation involving academies, special schools and AP centres was obligatory, scheduled to be held in the summer term. At present, a figure of £496 per place was set.

8.3 The following points were raised and discussed:

- Joanna Tuttle expressed disappointment that the formula did not take staffing costs into account. Concern was expressed that there was not a single school which had been adequately funded to cover the NI uplift.
- Steven Dewing stated that academies and federations were disadvantaged by the formula.
- Bob Groome queried if the figures and formula were similar for all other local authorities.
- Bob Groome suggested contacting other Schools Forums across England to put together a petition to the Education Select Committee regarding the formula. Officers confirmed that the government had been lobbied on several occasions to not make decisions which made schools poorer. It was suggested that Forum Members possibly write a collective letter which could be submitted to the government.
- The Vice-Chair asked if there was Schools Forum counterparts in Suffolk which could be contacted regarding a collective letter to the Government. Officers stated they had struggled to organise collective approaches with other Schools Forum on previous occasions.
- The Chair provided a comment from Lacey Douglass, who was unable to attend this meeting. It was noted that the majority of Early Years settings would bear the cost of any NI increases without grants being available.
- The Norfolk Schools Forum **agreed** to write a letter to the DfE outlining concerns regarding the NIC grant formula.
- The Chair suggested approaching other Schools Forums across the country to potentially organise a regional meeting, to improve connections. This was agreed by Forum Members and officers.

- Bob Groome offered to contact Amanda Martin MP and Jess Asato MP, both of whom currently sat on the Education Select Committee.
- Owen Jenkins stated that the local authority needed to take a flexible approach regarding the options, to reflect the impact on staff in schools.
- Matthew Smith commented that a technical paper on NICs should be shared to show the impact of the available options.

8.4 Having considered and commented accordingly on the report, the Norfolk Schools Forum **RESOLVED** the following:

1. To **NOTE** the report.
2. To **ASK** officers to support the writing of a letter from Schools Forum to the Department for Education (DfE) outlining concerns regarding the formula used for the National Insurance Contributions (NIC) Grant.

9. Early Years Expansion Grant 2025-26

9.1 Officers introduced the report, which set out information regarding the Early Years Expansion Grant for the 2025-26 financial year

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

- This was an unexpected additional grant for the 2025-26 financial year, allocating funding to all local authorities to support the expansion of early education entitlement from September 2025.
- There was no requirement for a consultation on how the funding was allocated.
- The methodology for allocating the funding would determine awards using Spring 2025 claim data.

9.3 The following points were raised and discussed:

- Joanna Tuttle stated that the methodology appeared sound and robust.
- Officers noted that this grant appeared to be a one-off for 2025-26. If it was recurring, there was a possibility of consulting in future years.

9.4 Having considered and commented accordingly, the Norfolk Schools Forum **RESOLVED** to **NOTE** the report.

10. Norfolk Schools Forum Constitution and Ways of Working

10.1 Officers introduced the report, which set out a proposed Norfolk Schools Forum forward work plan for the 2025-26 academic year.

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

- The review of the constitution remained a work in progress, as it was the aim to produce a bespoke document. There were plans in place for the Chair to meet with officers later in May 2025.
- Clarification was required regarding union members on the Schools Forum. A meeting was scheduled later in May 2025 to find a way forward.

- It was proposed to reduce the number of Schools Forum meetings from six per academic year to five meetings, by combining the two summer term meetings into a single date in June. The Norfolk Schools Forum was considered an outlier for having six meeting per academic year. The aim was to allow business items to be spread more evenly across Schools Forum meetings, while allowing extra time for actions to be picked up.
- It was possible to review the constitution annually if requested by Forum Members.

10.3 The following points were raised and discussed:

- The Chair asked if the Norfolk Schools Forum was unusual in not having sub-groups. Officers stated that many local authorities used sub-groups, which allowed items to be considered in great detail. It was not planned to consider sub-groups at this meeting.
- Bob Groome suggested possibly no longer holding meetings in March, due to a lack of business to consider. There had been occasions in previous years where the March meeting was cancelled outright. Officers stated there had been conversations around which meeting would be removed and would keep under review.
- Stuart Allen suggested a further reduction to four meetings per academic year, based on the draft forward plan.
- The Chair expressed concern regarding the reduction to five meetings per academic year, on the basis that meetings were already lengthy.
- Sarah Shirras noted that Schools Forum meetings had a healthy attendance at present and that Members were willing to commit the time for the existing meetings.
- The Schools Forum **agreed** to move to five meetings for the 2025-26 academic year.

10.4 The Norfolk Schools Forum **RESOLVED** to **APPROVE** a reduction to five planned meetings for the 2025-26 academic year and their approximate timings

11. Norfolk Audit Services – Annual Audit Report

11.1 Officers introduced the report, providing an update on Norfolk Audit Services' internal audit coverage for the 2024-25 financial year. The planned audit coverage for 2025-26 was also included within the report.

11.2 Officers thanked all schools who participated in the consultation and the Schools Forum for adopting the new risk-based audit approach.

11.3 The following points were raised and discussed:

- Matthew Smith stated that approximately 90% of maintained school budgets were currently spent on staffing and journaled. It was acknowledged there was a fair amount of complexity with the arrangements, but that this could be an area of high risk
- The Chair commented that poor leadership was another potential area of high risk.
- Peter Pazitka queried if the audit team were prepared to offer this service to academies, given that significant numbers of audit companies were not interested in the education sector. Officers stated there had been a move away from the traded audit approach during the 2024-25 academic year. The suggestion had been looked into previously and there did not appear to be much interest in the offer in Norfolk. It was acknowledged that a one-off audit would be difficult to organise given cost and staff implications. However, if a significant number of academies were interested, the suggestion could be revisited at a later date.
- Steven Dewing stated there would be a market for academy audits, noting that Sapientia had recently retendered a five-year contract for this.
- Steven Dewing queried the differences between the DfE guidance for academy audits and that for maintained schools.

- The Vice-Chair commented it could be useful for local authority colleagues to look at the Academies Financial Handbook to understand the expectation of the depth of both internal and external audits that Trusts were expected to undertake
- The Chair asked if the local authority had a mechanism in place to identify schools at risk and refer them for an audit. It was queried if this audit would also cover management structures and staffing. Officers confirmed that a process was in place.
- The Chair thanked officers for their report.

11.4 Having considered and commented accordingly on which areas were considered as higher risk for potential inclusion in the 2025-26 audit plan, the Norfolk Schools Forum **RESOLVED** to **NOTE** the report.

12. Norfolk Schools Forum Forward Work Plan

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

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

13. Any Other Business

13.1 There was no other business to consider.

14. Date of Next Meeting

14.1 The next meeting of the Norfolk Schools Forum was confirmed for **9am** on **Wednesday 2 July 2025**, to take place in the **Cranworth Room** at **County Hall**

There being no other business, the meeting closed at 12:43

**Martin White, Chair
Norfolk Schools Forum**



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Schools Forum Action Note – Friday 9 May 2025

Minutes Item No.	Agenda Item	Action	By Whom	Response
5.3, bullet point 4	Strategic Planning (including Local First Inclusion)	Owen Jenkins requested clarity regarding the funding of LFI initiatives, to scrutinise if they were providing value for money. An officer stated that data on the financial impact of LFI could be provided and summarised in a future report.	Dawn Fowler / Jane Hayman	Topic to be included in a future strategic update report in relation to the LFI programme
5.3, bullet point 6	Strategic Planning (including Local First Inclusion)	Stuart Allen suggested a report be brought to a future Schools Forum meeting considering the impact of SRBs, illustrating how much provision currently existed in the system and what was planned to be brought online in the future. This would provide a potential measure of success within the LFI programme.	Dawn Fowler / Jane Hayman / Nicki Ryder	Topic to be included in a future strategic update report in relation to the LFI programme.
5.3, bullet point 11	Strategic Planning (including Local First Inclusion)	Stuart Allen suggested organising a SEND conference in Norfolk during 2026, providing Forum Members with an opportunity to showcase and highlight success stories across the sector. It was noted that a previous event was organised by the LFI Executive Board. If another was organised, it was paramount to build upon the momentum afterwards rather than treat it as a one-and-done event.	Jane Hayman	This is an idea for further investigation that the LA have been considering. We will look to run a future summit as per the successful one held in Feb 25. We can feed this request through to the working party who will be planning this event. Our LFI communication strategy is also a regular place where we share success stories.
5.3, bullet point 22	Strategic Planning (including Local First Inclusion)	Bob Groome outlined an AP model used in Southend-on-Sea which targeted Key Stage 4 students who struggled with academic subjects. This model was based around hands-on intervention with work experience and college attendance. Students in the model received a National Vocational Qualification	Dawn Fowler / Jane Hayman	An introduction to an initial review of post 16 provision was shared at the LFI Reference Group in May with the intention of a more significant item at a future meeting.

Minutes Item No.	Agenda Item	Action	By Whom	Response
		(NVQ) assessment at the end of their tenure, with strong results seen from this model over the years. It was suggested that this model be examined in Norfolk, as it had assisted students towards practical qualifications and further employment prospects. An officer stated that the LFI Reference Group could examine post-16 education on their forward work programme.		
6.3, bullet point 5	Update on Element 3 Funding Assurance	Stuart Allen thanked officers for their work on the new processes, suggesting that an update report be brought back to the Schools Forum in 18 months' time. The Chair suggested an update for the Spring 2026 meeting of the Schools Forum.	Dawn Fowler / Samantha Fletcher	This is a long-term action for March or June 2026 Schools Forum (depending upon the most appropriate time for data availability to support the review) and has been added to the forward plan
6.3, bullet points 9 and 10	Update on Element 3 Funding Assurance	Owen Jenkins stated it was paramount to understand the assurance process. Concern was expressed regarding a lack of focus on Enhanced SEND Provision (ESP), with it appearing that the reporting mechanism was due to cease near future. An officer stated that the team had attempted to define what good practice looked like in small establishments over the past 12 months as part of the LFI programme. There was no intention to cease reporting. Communications on this issue were due to be sent out shortly. The Chair suggested that ESPs be considered at a future meeting of the LFI Reference Group, looking at equality issues. Officers agreed to investigate further.	Dawn Fowler / Alison Toombs	Further guidance was issued to all schools before half term. This will be considered for inclusion as an item on a future LFI Reference Group.

Minutes Item No.	Agenda Item	Action	By Whom	Response
7.3, bullet point 4	DSG Final Outturn and Balances 2024-25	Matthew Smith requested a breakdown regarding High Needs Inclusion Infrastructure sum, which had amassed to over £6m. Officers agreed to revisit the figures and provide a breakdown at a future Schools Forum meeting. It was noted that a large proportion of this sum was through Schools and Community Teams.	Martin Brock / Dawn Fowler	Topic to be included in a future strategic update report in relation to the LFI programme or as part of a future DSG financial monitoring report.
7.3, bullet point 7	DSG Final Outturn and Balances 2024-25	Rachel Quick queried if it was known which types of independent schools the High Needs Block was being spent on, and whether the provision for the additional 68 places was the root cause of lag within the LFI programme. Officers stated that a breakdown could be provided to a future Schools Forum meeting or via a briefing.	Martin Brock / Dawn Fowler	Topic to be included in a future strategic update report in relation to the LFI programme or as part of a future DSG financial monitoring report.
8.3, bullet point 8	National Insurance Contributions Grants 2025-26	The Norfolk Schools Forum agreed to write a letter to the DfE outlining concerns regarding the NIC grant formula.	James Wilson / Chair	Officers have supported the Chair to draft a letter to be sent to Bridget Phillipson MP.
8.3, bullet point 9	National Insurance Contributions Grants 2025-26	The Chair suggested approaching other Schools Forums across the country to potentially organise a regional meeting, to improve connections. This was agreed by Forum Members and officers.	Sam Fletcher	The opportunity is to be explored further and will be picked up in September.

Report to Norfolk Schools Forum

Item No: 5

Report Title: Strategic Planning: 2025 Spending Review & National Announcements

Date of Meeting: 2 July 2025

Executive Summary

This report provides an update on the key elements likely to impact upon Norfolk's education system following the Government's Spending Review announcement on 11 June 2025. While specific implications are still being understood, the paper summarises the key elements enabling consideration of potential impact upon the early years and the broader school system.

An update is provided on the latest position regarding Government SEND reform, including the delay until the Autumn for a white paper and potentially closer to Christmas in relation to funding announcements that may be part of the provisional Local Government Financial Settlement. Despite this delay, significant work continues in Norfolk to implement system change and to explore new opportunities, with a summary of the current and near-future focus of the LA in relation to this work.

High-level analysis of national SEN Census information is shared, which shows that Norfolk remains a significant outlier in relation to the proportion of the school population with Education, Health and Care Plans and those in specialist provision. This proportion with an EHCP has significantly increased since the last census results, above the % increase seen nationally.

Schools Forum are asked to:

- **Consider the key elements of the report, particularly the impacts of recent announcements for Norfolk and whether there any additional activity that the system in Norfolk could be undertaking to increase mainstream inclusion within the limited resources available within the whole system.**

1. Introduction and Background

- 1.1** Since the last meeting of Schools Forum, the Government announced the outcome of their Spending Review on 11 June 2025. Whilst the details of the implications are not yet fully known, key announcements related to the school system, including early years, is shared within this paper for Members to have in one place for awareness and consideration as to the potential impact upon the Norfolk system.
- 1.2** The promised SEN reform announcements continue to be awaited, with Government indicating that the original spring timeline has now slipped to the autumn. There continues to be significant media coverage. Additionally, the LA has received an initial response from the DfE regarding the recent SV submission and ongoing escalation regarding the two, agreed special schools. This paper provides a summary of the LA's latest understanding regarding awaited reforms, an update regarding Norfolk's SV agreement and special schools.
- 1.3** Whilst reforms are awaited, the focus has been on delivering the agreed system changes, along with working with partners to develop new opportunities. This paper provides a summary of the work underway and planned for the next 6 months, along with the current considerations as to what the awaited reforms may mean for Norfolk.
- 1.4** Finally, the latest SEN Census data has been published by Government and a brief analysis of the information and what it means for Norfolk has been shared.

2. Spending Review

- 2.1** The purpose of the UK Government's Spending Review is to set departmental budgets for future years, ensuring that public money is allocated effectively to meet national priorities. It is the process by which the Government sets out the total amount it plans to spend and allocates budgets to each department over a multi-year period. It covers both day- to-day spending (resource budgets) and long-term investment (capital budgets) and is designed to ensure public funds are used efficiently to deliver key outcomes such as healthcare, education, infrastructure, and economic growth.
- 2.2** In the run-up to the Spending Review budget boosts were expected for Education, Defence and the NHS, with other departments expected to face real-terms cuts (including local government services). The announcements reflected this expectation with day-to-day Education spending due to rise by £4.7bn a year by 2028-29.

2.3 Announcements in relation to the education sector specifically were:

- Schools (presumably mainstream) will have relatively small increases (0.4% real terms annually) when compared to Departmental Expenditure Limits (DEL) that will increase by 1.2% annually in real terms over the SR period (2026-27 to 2028-29). Whilst the Government has stated that the increase is in 'real terms', further details will be required to understand how pay inflation, in particular, will be funded given recent experience.

Extract of Spending Review Table 5.3: Resource Departmental Expenditure Limits (DEL) excluding depreciation

£ billion (current prices)	Outturn	Plans	Plans	Plans	Plans	Plans	Average Annual Real Growth	
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2025-26 to 2028-29	2023-24 to 2028-29
Education	81.8	89.2	94.1	98.3	100.1	101.5	0.70%	1.40%
of which: core schools	57.7	61.6	64.8	67	68.4	69.5	0.40%	0.60%

- With respect to reforming SEND, the Government stated that to make the system more inclusive and improve outcomes for all children and young people, the Government will reform the current Special Educational Needs and Disabilities (SEND) system. Details of the Government's intended approach to SEND reform will be set out in a Schools white paper in the autumn. The Government will also set out further details on supporting local authorities as the government transitions to a reformed system as part of the upcoming local government funding reform consultation.
- Free School Meals will be expanded from September 2026 to 500,000 children whose parents are receiving Universal Credit, regardless of their income. It is not yet clear how the expansion of Free School Meals (FSM) could impact upon schools funding, including whether it will be funded as part of the 2026-27 DSG or as a separate grant from September 2026. Either way, it will be important to understand how these changes are integrated into the existing funding formula and whether they are fully funded.
- The cost of school uniforms will be capped.
- The Government will continue to rollout breakfast clubs.
- The Government's commitment to deliver school-based nurseries across England continues with £370m across the next four years to support – further information is required to fully understand the additionality of this funding and the potential impact.
- An additional £1.6 billion per year by 2028-29 for government-funded childcare entitlements for working parents, boosting both children's life chances and the choices parents can make about work – further information is required to fully understand the additionality of this funding and the potential impact.

- The Holiday Activity Funding is currently until the of March 2025 and the Spending Review did not announce any continuation of this.
- The Government will use £132.5m from the dormant assets fund will be for arts events for underprivileged children at school.
- There will be £2.3bn per year to improve the condition of the school estate (referred to previously as 'crumbling classrooms' – previous announcements were £1.4bn in October 2024 to meet a target of rebuilding 50 schools a year – this potentially confirms additional funding to enable additional schools to be included within the programme, further information is required to fully understand the additionality of this funding and the potential impact.
- There will be £2.4bn per year to continue a programme to rebuild 500 schools – further information is required to fully understand the additionality of this funding and the potential impact.

2.4 Part of the announcements included reference to the Government's £3.25bn Transformation Fund to support the transformation of public services. This included £547m in 2026-27 and £213m in 2027-28 in relation to "Reform of the SEND system to improve pupil outcomes". This funding stream appears to be new and is, therefore, clearly welcome.

There are no details yet as to how this funding will be distributed or how these funds are to be used. The monies appear to be time-limited transformation resource that could, therefore, potentially support positive projects linked to our Local First Inclusion Programme. However, it is not clear and the absence of any indication of substantial additional recurring funding for either schools or local authorities in relation to SEND is concerning from the viewpoint of the current situation with the High Needs Block and the associated cumulative Dedicated Schools Grant deficit.

Clearly this will be kept under close review.

2.5 There were other announcements related to the children's social care system, the most significant of which from Schools Forum from a partner viewpoint would be.

- £555m set aside over the Spending Review period from the aforementioned Government Transformation Fund to improve support for England's most vulnerable children and young people. This is in addition to maintaining the existing £523 million per year for children's social care prevention within the current Local Government Financial Settlement. Additionally, there will be total capital investment of over £560 million to reform the children's social care system and support the refurbishment and expansion of the children's homes estate, intended to help more children and families stay safely together, expand support for care leavers and fix the broken care market.

- The Government have stated that they will continue to invest in and expand the Family Hubs programme, working with parents to help give children the best start in life – further information is required to understand the implications fully, but there is a potential link with early years funding and take up / support.
- 2.6** Since the Spending Review announcements, the MHCLG has published its Fair Funding Review 2.0¹, which is the Government’s mechanism for consulting upon their proposed approach to local authority funding reform through the Local Government Finance Settlement for 2026-27 (i.e. how the overall funding available for local government will be distributed).
- 2.7** The Fair Funding Review 2.0 includes clarification on the future of the statutory override currently in place for local authorities in relation to cumulative DSG deficits. The statutory override has been extended to March 2028 with the intention of supporting transition to a reformed SEND system:
“The Department for Education Spending Review settlement confirmed funding for reform of the current Special Education Needs and Disabilities (SEND) system, details of which will be set out in a White Paper in the autumn. We recognise that local authorities will need support during the transition to a reformed SEND system. The government will commence a phased transition process which will include working with local authorities to manage their SEND system, including deficits, alongside an extension to the Dedicated Schools Grant Statutory Override, which is currently due to end in March 2026, until March 2028. The government will provide more detail by the end of the year including a plan for supporting local authorities with both historical and accruing deficits. We will set out more detail at the provisional Local Government Finance Settlement”.
 The Government have confirmed that further detail will be provided within the provisional Local Government Financial Settlement.
- 2.8** Whilst there were no specific announcements in relation to Pupil Premium funding in the Spending Review, concerns have been raised in the media (Schools Week) in relation to transitional protections ending that were put in place during the rollout of universal credit where family income increased. In response, the DfE have stated that
“current level of pupil premium and related school funding will be maintained and no-one will lose pupil premium eligibility next year, while we look over the long term at how we allocate it in a better targeted way”. The Government have stated that it is anticipated that total pupil premium spending will be £3bn.

¹ <https://www.gov.uk/government/consultations/the-fair-funding-review-20>

- 2.9** Additionally, in response to an MP question raising concerns about fairness of the National Funding Formula for mainstream schools, the DfE have also confirmed that they are reviewing the way that school funding is calculated ahead of the 2026/27 academic year (BBC news):
"We are reviewing the schools and high needs national funding formula (NFFs) for 2026-27 and the following years, recognising the importance of establishing a fair funding system"
and that, over the longer term,
"we recognise there are disparities in outcomes for children attracting pupil premium and this government is committed to doing more to improve the life chances of our most disadvantaged children and break the link between background and future success."
"We are therefore reviewing how we allocate pupil premium and related funding to schools and local authorities to address this issue and ensure it is targeted to those who need it most – while maintaining the overall amount we spend on these funding streams."
- 2.10** The position regarding 2026-27 funding arrangements will be kept under close review as the LA receives further information and will be shared with Forum when it is available.

3. SEND Reforms and Norfolk's Position

- 3.1** As detailed in the section above, the Government have now announced that there will be a white paper in the autumn, with further details regarding the Government's "plan for supporting local authorities with both historical and accruing deficits" to be set out before the end of the year.
- 3.2** From an LA viewpoint, this is a very challenging timescale given the very real challenges posed to us, and many other LAs, in relation to the cash flow of supporting ever-increasing cumulative DSG deficits. This situation has been reflected in a number of recent news articles, for example, by the Local Government Association and the Guardian, amongst other press. The extension of the statutory override does not protect the local authority from the real challenge of funding the deficit in cash terms.
- 3.3** A key element of the reporting (prior to the extension of the override) was the Public Accounts Committee message to the Treasury in relation to the estimated £5bn deficit and the need to urgently address it. The Guardian had reported in March that deficits were expected to rise by 54% during this year.
- 3.4** It has been reported that by the end of next March, at least 15 councils will have accumulated cumulative deficits exceeding £100m, with c. 25% projecting cumulative deficits exceeding £50m. This is with the backdrop of c. two-thirds overspending their High Needs Block last year (18 of which by more than £30m in-year).

- 3.5** The LGA have urged Government to write off the deficits and (prior to the extension of the override) were reporting that over half of council's would be, effectively, insolvent at the end of March 2026.
- 3.6** Whilst it is welcome that the Government have confirmed that there will be a white paper published in relation to SEND reform, it is really disappointing that this has been further delayed from the initial announcement of spring for reforms to be announced, particularly given the pressures systems all over the country are experiencing. There is a sense that the reforms, when they come, could be fundamental based upon the coverage that there has been in media (e.g. potentially significant changes to EHCPs and tribunals).
- 3.7** In the meantime, the LA have continued to engage with the DfE in relation to our current Safety Valve agreement and seeking progress with the agreed two special school builds.
- 3.8** In relation to the special schools, the LA has continued to escalate the need for urgent progress and the risks that the ongoing delays are causing both in terms of opportunities and outcomes for children that would benefit from this provision, as well as financially (e.g. in relation to contributing to the demand for independent provision). To date, the DfE have not provided clarity regarding when the go-ahead will be given.
- 3.9** In relation to the DfE contributions to Norfolk's cumulative deficit, as reported at the previous Forum meeting, we submitted the latest version of our modelling to the DfE in early May as per their request. This modelling sought to demonstrate best available value for money under the current statutory arrangements, though it was unclear what the DfE were looking for. This longer-term modelling was based upon the principles of stabilising the system in the medium-term, whilst bringing online additional specialist provision, and then assumed a moderate impact of anticipated reforms resulting in increased inclusion in mainstream provision along with restriction and reduction of the independent sector.
- 3.10** Since the May meeting of Forum, the LA has received a response from the DfE requesting further information, including an extension of the financial forecast to show when an in-year balanced position will be reached (with the recognition that this may be many years ahead) within the current statutory framework, and further context regarding forecasts relating to independent and post 16 provision. Re-submission is requested by mid- July, and we are aware that Norfolk is not the only area in this position. The LA is consulting with both the SEND and finance advisors appointed by the DfE ahead of re-submission.

4. Local Focus in Norfolk

- 4.1** Whilst this Forum's strategic update paper is not specifically covering Local First Inclusion, the LA thought it would be helpful to provide a high- level update on transformation work both underway and planned for the next 6 months given the delay until the autumn, and potentially close to Christmas, of the SEND reforms.
- 4.2** The LA are also very conscious that given that reforms are expected to be fundamental in nature (based upon media coverage to date), it is likely to be multiple years prior to planned implementation and they may be subject to legal challenge that could delay or amend them. Therefore, continuing to seek to improve the SEND and AP system in Norfolk is our 'business as usual' given that, regardless of reform, the transformation needed is a multi-year endeavour that requires multiple different elements of change to be in place to improve outcomes for children and young people as well as seeking to reduce the financial challenges faced.
- 4.3** This term, the focus has been on continuing to roll out the SEND and Inclusion Support Model, including Zone Inclusion Partnerships and Team Around the School meetings. The role out will continue into the autumn for the final tranche of zones alongside continue to embed the approach into Norfolk's normal working practices.
- 4.4** Work continues to embed the new Element 3 model due to come into effect from September, in-line with the significant previous reporting to Forum in relation to this work. This work includes ensuring that discussions that there is the right flow of information from discussions about provision required to meet need as part of Team around the School meetings to inform funding decision making.
- 4.5** Following on from the initial piloting of Local Planning Partnerships (LPPs) in Kings Lynn (alongside the launch of the initial secondary SEMH base) and the year-on-year reduction in permanent exclusions seen, we are now preparing to roll out nine further LPPs in the autumn, which will mean that all secondary schools in Norfolk will be part of one of the partnerships. These partnerships are designed to enable school leaders to make shared decisions on how Tier one (targeted support in mainstream schools which is early intervention and outreach support) and Tier two (time-limited placements in 19 new SEMH bases and centres) provision should be used to support pupils across their schools. If the impact seen in Kings Lynn, even before an SEMH base was available, can be replicated across the county, then we would expect to see a reduction in permanent exclusions in the next academic year.

- 4.6** Work with health partners continues despite significant changes in the health sector, such as sweeping Government reforms of Integrated Care Boards with associated savings to make. This partnership work is an area that we hope to be able to report more fully on at a future meeting, as well as via various partnership groups involving school leaders. In particular, we are focusing on the resourcing and roll out of a new model for supporting neuro-diverse children and seeking to extend the reach of mental health support teams in schools
- 4.7** Following engagement and feedback through various routes (including the LFI reference group and DSG consultation as well as from Forum Members), work continues to embed consideration of early years provision and providers throughout all workstreams within Local First Inclusion. Similarly, we are exploring whether there is sufficient focus on post 16 provision, and this is an item to return to a future LFI reference group meeting for deeper exploration.
- 4.8** Alongside this work, we continue to deliver on the capital programme to develop specialist provision (particularly in mainstream settings), to explore AI opportunities to support efficient and effective working, to review internal pathways and processes in relation to EHCPs and specialist provision admission, and to commence preparation for annual DSG related consultations.
- 4.9** A further key focus for the programme remains the ongoing work with all schools on inclusive practice and learning – looking to spread quality first teaching, Norfolk Steps and curriculum approaches which supporting inclusion as widely as possible. It is clear from Inclusion and Provision Self-Evaluation Framework (IPSEF) data and other sources that confidence and capacity to support children with SEND is growing in Norfolk and this vital work remains a critical priority.
- 4.10** In relation to governance, we have been reviewing whether existing arrangements remain fit for purpose having moved from the initial Safety Valve agreement and the inception of the Local First Inclusion programme to the programme being part of our ‘business as usual’ in Norfolk.
- This review has also considered our arrangements for oversight of Norfolk’s SEND and AP Strategy (NASAPS) and associated priorities and action plans, and the opportunities that the review of Schools Forum terms of reference and ways of working may offer.
 - At the recent LFI Executive Board it was agreed that we intend to ‘lay down’ the board, with the intention to refresh and strengthen the Local Inclusion Partnership (LIP) alongside the refresh of NASAPS and NASAPS actions (currently underway over the summer) to clearly include the actions and impact of LFI transformation within them, enabling governance scrutiny of the actions being taken through the programme and the impact of the programme to be considered within the context of the wider SEND & AP strategic improvement in Norfolk.

- As part of this refresh of the LIP, it is intended that terms of reference and membership will be reviewed (including ensuring there is sufficient school sector leadership and whether there are direct representatives from Schools Forum).
- Later on this agenda, within the 'Norfolk Schools Forum Constitution & ways of working' paper, there is a consideration for Forum about whether to establish a High Needs Working Group that would support financial and performance scrutiny with school leaders, allowing appropriate reporting into SF to offer assurance.
- There will be a further LFI Executive Board meeting, probably in September, to confirm the new arrangements once all engagement with existing key groups has taken place and work to review membership and terms of reference of LIP has been completed.

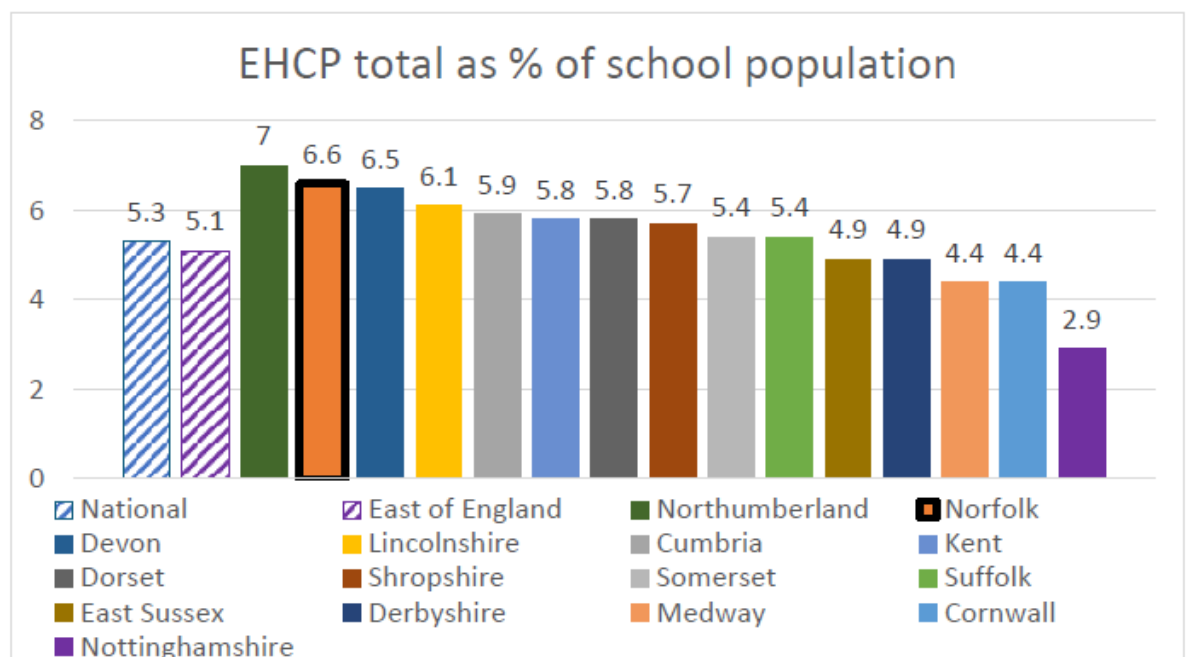
4.11 As detailed elsewhere in this report, we are continuing to escalate the need for a quick resolution to the special schools that are currently on hold. We are also considering what the implications of reforms may be, including the explicit Government direction to try and support greater inclusion in mainstream schools and what this might mean for Norfolk. Whilst we are seeking to 'future proof' current initiatives underway, we are also in the process of thinking about what other transformative options there could be in Norfolk. Whilst the LA are not in a position to share this thinking at this stage, we will seek to engage with both the LFI reference group and Forum as this develops. Along with refreshed governance arrangements, as detailed above, we believe that this will put Norfolk in the best possible position from which to respond to the reforms.

5. SEN Census 2025

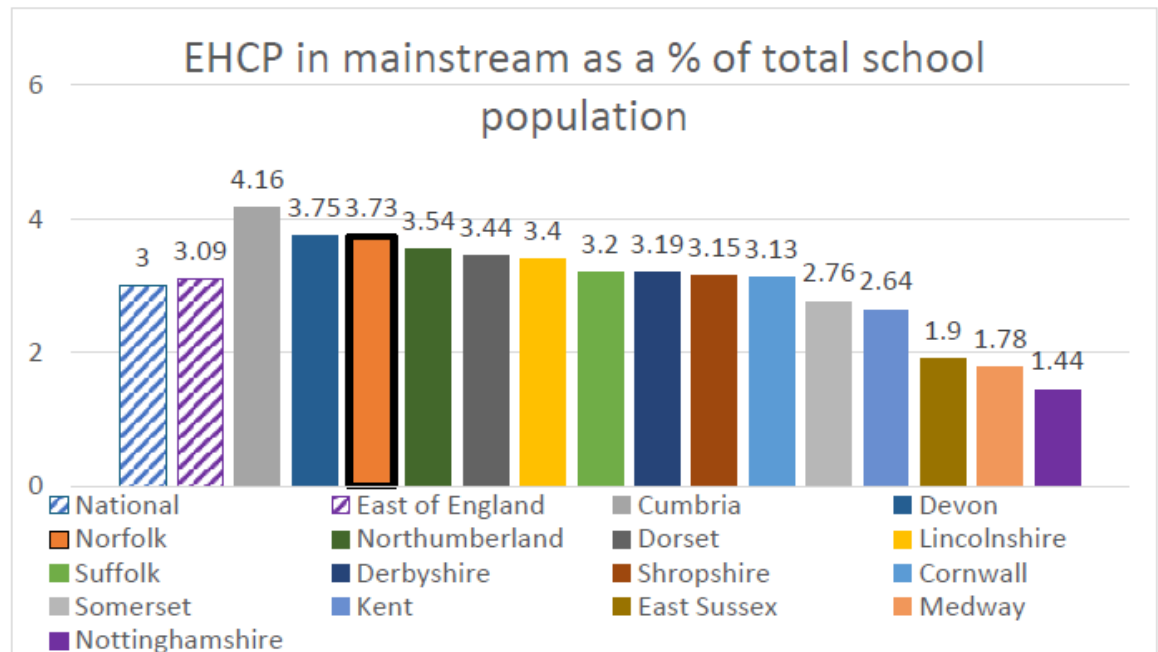
5.1 The Government has published the information gathered from the latest school census on pupils with special educational needs (SEN) and SEN provision in schools.² This publication analyses the characteristics of pupils by their special educational needs provision and type of need. It's based on data collected through the school census, general hospital school census and school-level annual school census (SLASC) for independent schools. The census covers pupils with all identified SEND, (SEND Support and EHCP) but, for the purposes of its relationship to potential SEND reforms, we have included headline information relating to EHCPs only.

² <https://www.gov.uk/government/statistics/special-educational-needs-in-england-january-2025>

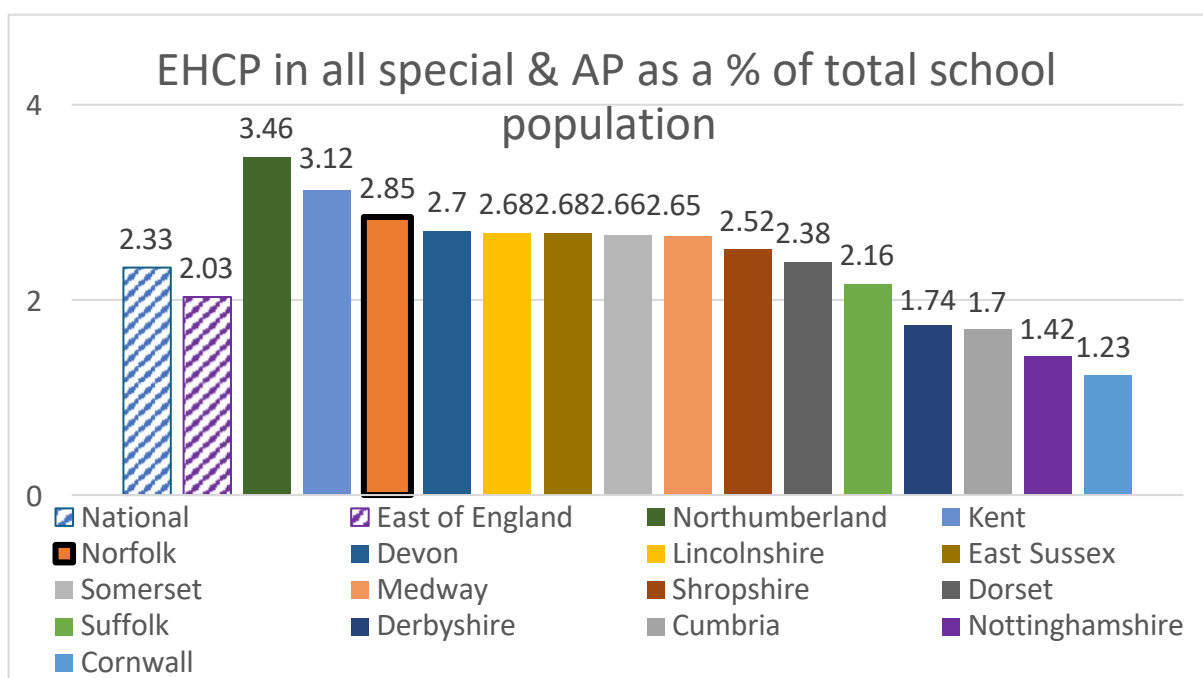
- 5.2** Some initial, high-level analysis has been undertaken to consider how Norfolk compares to statistical neighbour shires (both previously and newly identified statistical neighbours) as well as both the national and regional positions.
- 5.3** The first comparison is the total population with an EHCP (Education, Health and Care Plan) as a percentage of the total school population. This data shows that, except for Northumberland, Norfolk has the highest ratio of children and young people with EHCPs compared to statistical neighbours, of the whole region and nationally.
- 5.4** Norfolk's increase from last year is 1% (5.6 to 6.6%) whereas nationally, the rate has only increased by 0.6% (4.7% to 5.3%). This indicates that not only is Norfolk starting at a higher-than-average rate of EHCPs per year compared to the national, the rate of increase over the last two years is also disproportionately higher.
- 5.5** As reported recently Norfolk has now seen a decrease in the rate of referrals for EHCP over the last 6 months compared to the previous year which we hope will continue but this national data does contextualise that decrease helpfully in terms of the starting point, and it is important to be clear that although the rate of new referrals has declined it is still far higher than the rate at which plans are ceased meaning an ever increasing proportion of the child population has an EHCP in Norfolk.



- 5.6** The second comparison is the total population with an EHCP attending mainstream school as a percentage of the total school population. Children who have an EHCP and are attending a Specialist Resource Base (SRB) are included within this data. Again, Norfolk is an outlier, with only Devon and Cumbria with higher rates of EHCP children in mainstream (with Cumbria, conversely, having a very low population of children within specialist provision by comparison).



- 5.7** This data could suggest that there is evidence that Norfolk schools are dealing with a greater scale of need than comparator areas, but it could also be an indicator of higher identification of need. If an area has a higher percentage of children and young people with an EHCP in an overall school population, then this is likely to be reflected when broken down by specific sector.
- 5.8** The third comparison is the total population with an EHCP attending either a special school (state-funded or independent) or alternative provision as a percentage of the total school population. Children who have an EHCP and are attending a Specialist Resource Base (SRB) are excluded from this data. Again, Norfolk is an outlier, with only Northumberland and Kent having higher proportions. Whilst Norfolk does have a high ratio in independent provision, contributing to the overall percentage in specialist provision, the data clearly shows how reliant the Norfolk system is on “non-mainstream” provision overall.



- 5.9** Whilst we have not provided the same data for children at SEND support in this paper, it should be noted that the % of children in Norfolk identified at SEND support is also higher than national averages (14.5% Norfolk, 14.3% national), but the rate of increase in the last 2 years has been lower in Norfolk (0.2% Norfolk, 0.6% national).
- 5.10** Whilst this is very high-level analysis on recently available data, it does raise some key questions or considerations for the whole system to reflect upon. For example:
- Does Norfolk have additional, inherent need than statistical neighbours?
 - Does Norfolk have a higher identification of need that other areas would not identify as a SEND need?
 - Do other factors contribute to a higher need or identification of need? For example:
 - Do poor outcomes at Key Stage 2 lead to increased SEND identification?
 - And / or is there lower capacity, confidence and / or capability within mainstream provision to support inclusion?
 - Does access to funding remain a driver for EHCPs? Whilst Norfolk removed the link between EHCPs and funding, is this understood well enough by schools, providers and parents?

6. Recommendations

Schools Forum are asked to:

- Consider the key elements of the report, particularly the impacts of recent announcements for Norfolk and whether there any additional activity that the system in Norfolk could be undertaking to increase mainstream inclusion within the limited resources available within the whole system.

Officer Contact

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

Officer name: Dawn Fowler
Telephone no.: 01603 228834
Email: dawn.fowler@norfolk.gov.uk



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Report to Norfolk Schools Forum

Item No: 6

Report Title: DSG Consultation Preparation 2026-27

Date of Meeting: 02 July 2025

Executive Summary

During the autumn term, the Local Authority will be undertaking the annual consultation with schools and settings in relation to the Dedicated Schools Grant funding arrangements for the 2026-27 financial year.

This paper sets out the proposed arrangements for the DSG Consultation with mainstream schools, including proposed dates and key items to be included in the consultation documents, and current LA expectations regarding Early Years and Special Schools consultation.

Schools Forum are asked to:

- **Consider and comment on the key elements identified to be consulted upon, based upon the current information available to the LA, including the identification of any additional elements for the LA to consider consulting on.**
- **Consider and comment on the proposed consultation arrangements, including providing a view on how information is provided to achieve the greatest engagement, including how consultation sessions are structured.**

1. Background

- 1.1** The Local Authority is beginning preparations for its annual DSG consultation for the autumn term for mainstream schools' funding.
- 1.2** In previous years, the LA has also undertaken consultations with Early Years settings and Special Schools in relation to elements of their respective funding formulae. Please see sections 6 and 7 for the current LA view of potential consultation for these sectors.
- 1.3** At this stage, the LA is preparing for consultation on the basis that there will be no significant amendments to funding and / or consultation requirements in relation to the DSG for 2026-27 financial year.

2. Mainstream schools' consultation topics

- 2.1 Particular topics proposed to form part of the consultation for mainstream schools' 2026-27 funding are:
- 2.2 **DSG block transfer** – As previously discussed at Schools Forum, the LA is of the view that the Schools Block to High Needs Block transfer should be reduced or removed from 2026-27. This view has been shared with the DfE as part of submissions in relation to the Norfolk's Safety Valve agreement.
- 2.3 The LA has sought support from the DfE with this approach but have, to date, not received any response on this specific matter either supportive or otherwise.
- 2.4 This view has been formed based upon significant engagement with multiple school leaders, previous DSG consultations and consultation with Schools Forum, based upon supporting the ongoing cultural change within the system to enable mainstream schools to support children to remain in mainstream schools. This is enabled through maximising the funding into mainstream schools allocated to Norfolk via the National Funding Formula, which supports schools to plan effectively whilst also enabling increased accountability of all mainstream schools to support children with high needs SEND.
- 2.5 In recent years, the funds have, in effect, been moved from the Schools Block to High Needs Block to then redistribute via Element 3 fund back to mainstream schools. Following the very significant work by the whole system to move to a new funding model for Element 3, there is now a much clearer picture of the whole need within the mainstream system and a fair method for the allocation of funding. Through having the right infrastructure in the place, the revised Element 3 model supports the LA's desired approach to reduce or remove the block transfer. The effect would be that funding is no longer taken from the Schools Block to redistribute via the High Needs Block as the funding will be retained by mainstream schools to use to meet the needs of their pupils.
- 2.6 Therefore, at the stage, the LA is not anticipating consulting with schools on a block transfer for 2026/27. However, the LA may seek to engage with schools as part of the consultation as to how, as a system, we can further increase mainstream inclusion, including seeking views on whether any locally determined financial mechanisms could be amended to support the overall goal of inclusion.

- 2.7** However, this position may need to change prior to the finalisation of the consultation, depending upon any direction received from the DfE. If this was to happen, then Schools Forum Members will be asked to vote on 0.5% block transfer at the November 2025 Schools Forum meeting, following collation of consultation feedback from schools. Members will also be asked whether they support a further 1% block transfer to be requested via a disapplication to the Secretary of State (the deadline for a disapplication for Safety Valve authorities is usually late November).
- 2.8 Funding formula** – Options for local arrangements for mainstream schools' funding formula, taking into account any information or changes in National Funding Formula requirements for 2026-27 from the DfE. The LA usually expects to receive information from the DfE mid-to-late July for changes to the local/National Funding Formula for the following year. Information was received later for the 2025-26 financial year, due to the election of the new Government, but LA Officers would expect the normal timeline to resume for 2026-27 funding arrangements information. Feedback from the consultation will be collated and presented to Schools Forum for their recommendation at the November Schools Forum meeting. The final funding formula will be decided by the local authority, taking consultation feedback and Schools Forum recommendations into account.
- 2.9 Notional SEN % & Methodology** – The DfE originally published information for the 2023-24 financial year setting out approaches nationally to notional SEN in terms of the average % of formula, the factors used by other LAs, and the recommended approach to methodology.
- 2.10** At that time, the national average for notional SEN was 11.3% based on prior year data, and Norfolk proposed working towards aligning with that average over time starting in 2024-25 and over a three-year period (by 2026-27 financial year).
- 2.11** For 2024-25 and 2025-26, the DfE published the national average %'s for notional SEN as having increased to 11.5% and 12% respectively based on prior year data. It would be reasonable to assume that part of the increase in national average may be as a result of other LAs with a low notional SEN %, like Norfolk, also trying to align with the national average and DfE recommended methodology.
- 2.12** Over the last 2 years, as discussed at Schools Forum previously, Norfolk has begun to move towards alignment of its notional SEN % within the mainstream funding formula, initially towards the original national average of 11.3%, though the updated national average has been noted.

- 2.13** Norfolk's notional SEN % increased from 6.61% to 7.61% in 2024-25 initially, and then up to 9.11% for 2025-26. At the same time, Schools Forum agreed a change of methodology for the notional SEN in 2025-26 to improve the balance between deprivation and low prior attainment factors, aligning further with DfE recommendations.
- 2.14** Since this work started, socio-economic circumstances have changed, bringing additional pressures to schools funding generally. Whilst, initially, it had been indicated that the then national average of 11.3% would be reached over 3 years (with 2026-27 being the third year), consideration needs to be given as to whether an increase the increase needs to be staged over more years.
- 2.15** Therefore, the LA is currently considering including two options for the autumn consultation, being:
- Option 1** - a further incremental increase of 1% to the notional SEN % as part of the consultation for 2026-27, taking Norfolk from 9.11% to 10.11% in the formula, with future increases continuing towards alignment with the national average, or
- Option 2** – an increase to bring the notional SEN % up to original average of 11.3% in 2026-27 based on the original intention to move to that level of notional SEN % by 2026-27 financial year, noting that this would not fully align with the up-to-date national average that is a moving target, but would put Norfolk squarely in the middle of the most commonly used range of percentages by LAs in their 2024-25 formulae, which was 10% to 12.5%.
- 2.16** The LA will be looking to understand the benefits / disbenefits from the system about the speed of moving closer to neighbours and the national picture, given expectations on Norfolk schools has been lower than many good performing authorities to date.
- 2.17 Affordability of Funding Formula (including MFG level)** – Last year there was strong agreement to managing the affordability of the mainstream funding formula via reduction of National Funding Formula (NFF) values rather than reintroducing a Hard Cap. However, there was also a suggestion that it could be reviewed each year through the consultation.

- 2.18** In addition, there was a question raised within Schools Forum over the continued use in Norfolk, in the current climate, of the maximum Minimum Funding Guarantee allowable by DfE, which the LA does to protect against losses. For 2025-26, the LA set the MFG level at 0% (at the top of the DfE's allowable minus 0.5% to 0% range). This replicated the NFF because the NFF included a 0% Funding Floor for the DfE's calculation of individual schools' funding within the NFF. The impact of this approach is limiting the gains of those schools due to gain due to the protection of those who would, otherwise, see losses.
- 2.19** Given the query raised in Forum, differing levels of MFG could form part of the consultation for 2026-27 if desired and assuming the DfE arrangements for 2026-27 will allow it.
- 2.20** **Scheme for Financing School Updates** – There are currently no directed revisions to consult upon, but a separate paper in respect of local updates has been provided for this meeting.

3. Consultation with all schools, including mainstream

- 3.1** Alongside the consultation with mainstream schools, the LA anticipates consulting with all schools with respect to **Arrangements for funding of children receiving education under Medical Needs Alternative Provision** – to date, children enrolled in schools but who are absent due to medical needs and receiving their full education through local authority arranged alternative provision under S19 Education Act remain part of the school census, with their funding remaining in their schools budget.
- 3.2** The number of children in receipt of their full education through the local authorities' medical needs alternative provision offer has substantially increased over time. In academic year 2020-21, 151 children received education through the medical needs' alternative provision offer. By 2023-24 academic year, this number had risen to 531, an increase of 227%.
- 3.3** This has resulted in significant increase in expenditure on the high needs block to provide education to this group of children, from £0.654m in 20-21 to an outturn of £2.06m in 24/25. It is also presenting significant challenges in respect of capacity in the system, with the core medical needs offer at UET Pathfinder exceeded for some time requiring the LA to make further arrangements for the procurement and commissioning of unregulated AP (tutoring, e-learning), in addition. This is resulting in further cost to ensure the appropriate infrastructure inside NCC for the delivery, oversight, procurement and commissioning of this provision.

- 3.4 Currently, even where children receive their full education provision through the medical needs AP offer, schools retain the full funding for the child, including pupil led factors. There is currently no contribution from schools to the cost of their alternative provision meaning that the child's education is in effect being funded twice, once from the school's budget and again from the high needs block.
- 3.5 The mechanism for how this group of pupils is funded is set by the relationship between the Schools Census and the annual LA Alternative Provision census. The LA is initiating a wholesale redesign of its arrangements for children requiring alternative provision due to illness and as part of this will be reviewing the current arrangements for pupil funding.
- 3.6 The AP Census guidance confirms that: *Some pupils may legitimately appear on the AP census and schools' census. For example, where their main source of education could be in AP, but they could also be registered at a maintained school that has not arranged the AP. In this case, the LA is taking responsibility for the pupil's education and to reflect this, the pupil will be recorded on the AP census. The pupil is, however, registered at the school and so to avoid double counting, such pupils should also be recorded at the mainstream school...as having a registration status of 'S' – current subsidiary (dual registration). **The pupil will be funded through the dedicated schools grant by way of the high needs block and not the school census registration. Do not record those pupils on the AP census if registered at a maintained school who's responsible for a pupil's main education and, as part of this, has arranged some AP...record these pupils as 'C' (single registration at this school).***
- 3.7 The LA would like to consult on the idea of potentially applying this mechanism for Census coding and funding of pupils under its medical needs service where the LA is arranging all or the majority of a pupil's education under its medical needs AP and would be keen to seek views from the education system on this proposal. Were this to be implemented it would ensure funding follows the child and creates stronger incentives for schools to also support their pupils who are absent due to medical needs by making arrangements for AP themselves, maintaining strong links to the current school which facilitates stronger opportunities for reintegration to school. The LA plans to engage further with schools regarding the redesign of its medical needs AP arrangements in the autumn term, initially through the LFI Reference Group in September. It is anticipated that the consultation would seek to gain an understanding of the potential impact for schools of the proposal and could seek views on how an alternative model could be applied.

4. Mainstream schools' consultation sessions

- 4.1 The autumn DSG consultation is planned to be run for the period **3rd October – 24th October**.
- 4.2 The LA will publish a consultation document alongside technical papers, where appropriate, to enable schools / Trusts to see the impact of proposals upon themselves and the wider school community.
- 4.3 It is proposed that consultations briefings for schools should be held on the following dates:

8 October 14:00 - 16:00	County Hall, Ground Floor, Old Canteen
9 October 15:45 - 17:45	MS-Teams meeting
22 October 15:45 - 17:45	MS-Teams meeting.

5. Additional Consultation of Schools Forum Members

- 5.1 In addition to the consultation with schools for the mainstream formula items in section 2, the LA will consult with Schools Forum Members in relation to the following items for 2026-27:
- 5.2 **Falling Rolls** – Although Norfolk does not currently retain a Falling Rolls fund, it was previously agreed with Schools Forum to review the requirement for a Falling Rolls fund annually. Therefore, a Falling Rolls fund will form part of consultation with Schools Forum Members, for 2026-27.
- 5.3 The LA has discretion over whether or not to propose a Falling Rolls fund, but, if proposed by the LA, Schools Forum Members will be asked to agree both the value of any fund and its criteria for allocation.
- 5.4 A Falling Rolls fund can only be used to provide funding where the SCAP (School Capacity Survey) data shows that school places will be required in the subsequent 3 to 5 years.
- 5.5 The LA is currently considering the potential requirement for a Falling Rolls fund and will consult Schools Forum on whether a Falling Rolls fund is required for 2026-27, including the value and criteria of any fund, during the autumn.
- 5.6 **Growth Fund** – The LA currently retains a Growth fund for mainstream schools'/academies' in-year growth including new arrangements for new schools.

- 5.7** Primarily, the Growth fund provides additional funding for changes to pupil numbers occurring at the start of the new academic year, which are not otherwise picked up through planned pupil variations, due to them not being certain until final admissions data is known. It also funds pre-and-post opening arrangements for brand new schools during their period of growth to capacity. The value of the Growth fund and its criteria are agreed with Schools Forum Members each year.
- 5.8** The LA considers that there is an ongoing need for a Growth Fund and will, therefore, be consulting with Schools Forum Members during autumn for the retention of a Growth fund for 2026-27 including its value, intended use, and criteria.
- 5.9 De-delegation and Central Budgets** – The LA will consult with Schools Forum for decisions on the various de-delegated budgets for maintained mainstream schools, as well as budgets funded from the Central Schools Services Block as usual during the autumn.

6. Early Years

- 6.1** If the LA proposes to make changes to the funding formulae it used during the previous financial year that will affect early years providers, it must first consult early years providers and Schools Forum.
- 6.2** At this stage, the LA are not expecting any significant changes to the funding allocations to Norfolk beyond any rate uplifts across the different age groups, that can be 'passed through', presuming that the DfE make no significant amendments to funding and / or consultation requirements.
- 6.3 Additional EY Funding/Grants** – Recently, there has been receipt of additional funds in year for EY providers where there is not sufficient time to consult as to how they are distributed due to DfE timescales. It is proposed that the consultation considers how any additional grant funding received in year by the LA is distributed, considering the principles of how those should be allocated to providers (e.g. additional funding towards teachers' pay/pension increases).
- 6.4** Additional grants to support teachers' pay/pension increases have been made by DfE based on numbers of children in school run settings, irrespective of the model of delivery and if it is teacher run. Through consultation we can identify the principles of how we distribute similar funding in the future. For example, should Norfolk mirror the approach to allocation and only distribute funding to school run settings, or should Norfolk use the funding universally across the Early Years sector to recognise that other, but similar, costs may be incurred for all types of provision?

- 6.5** If Norfolk was to consider distributing funding to teacher-led school-based settings only then we would need to consider with the sector how we define teacher-led, and then we would need a data collection approach to identify such settings.
- 6.6 Disadvantaged Funding Take-up** – There are some concerns, supported by available data, that the expansion of working family childcare funding may have had a negative impact on the take-up of places from disadvantaged families. Through consultation, we could consider a higher rate for disadvantaged 2-year-old funding than the working family entitlement.
- 6.7** The consultation could be an opportunity to engage broadly with providers for suggestions of how to enable and encourage take-up of disadvantaged early years funding, as well as, potentially, having the impact of raising awareness with providers about what they could do themselves to encourage this take up.

7. Special Schools

- 7.1** The special school funding formula was last reviewed and implemented for the 2022/23 financial year following substantial review work between the LA and special schools. Given there had been considerable time between this and a previous review of the funding formula, it was agreed that there should be an assumption that the funding formula should be reviewed every 3-5 years. This timeline was to achieve the balance between keeping the formula relevant whilst also acknowledging the resource required by both special schools and the LA to undertake such a review.
- 7.2** Inflationary and Minimum Funding Guarantee uplifts have been applied to the top-up values since the review in line with regulations and the inflationary funding agreed.
- 7.3** Following a request from a Forum Member, the potential addition of a GCSE-led element within the formula was also consulted on with schools for the 2024-25 financial year for schools with pupils studying more than 5 GCSEs to support additional teaching/examination costs (5 good GCSE passes being the equivalent of a Level 2 qualification). There was not strong support for a shift in the funding formula recognising the overriding principle that all schools would need to balance its qualification and curriculum offer to children within the constraints of available funding on a fair basis. As a result, Schools Forum did not support the introduction of an additional funding element at that time.

- 7.4** Additional inflationary uplifts were applied to special schools which host residential provision starting from September of financial year 2023-24. This addressed historical cost pressures associated with its delivery in recognition that the funding formula review did not cover the residential component, which incurs additional costs principally due to the staffing required to operate boarding in addition to the staffing of the school. Further identified cost pressures associated with some schools hosting residential provision is being addressed through direct dialogue with affected schools in acknowledgement that it is problematic to reconcile this through a funding formula applicable to schools which do not host residential provision.
- 7.5** Whilst the LA only has access to maintained schools' balances information, it is a reasonable assumption that academies funded through the same formula will have similar costs/pressures (with the exception of residential provision as detailed above).
- 7.6** The application of inflation to the formula over the last 2 years appears to have played a part in increasing maintained schools' balances, given the high level of grants also provided by the DfE. Additional DfE grants announced later during the year have meant that that schools may not been able to plan and use additional grant funding effectively in the relevant year due to managing the risks of insufficient funds having to drive management decisions. The LA considers that there now needs to be a period of consolidation of any inflationary element before making assumptions about the current efficacy of the funding formula. It is reasonable to assume that academies (excluding those with residential provision) will have experienced similar increases in surpluses derived from inflation to the formula.
- 7.7** Therefore, the LA's recommendation is not to undertake a full special schools' funding review this year, as evidence suggests that the funding formula is broadly appropriate, and there is not strong evidence of financial pressures within special schools.
- 7.8** The LA proposes to keep balances under review and reconsider the position next year as we do not consider that there is currently sufficient evidence to necessitate the investment required of all parties to a whole-sale funding formula review at a time of multiple of the pressures and changes within the system. This does not preclude any individual school seeking to engage with the LA over its funding in the interim, reflecting, especially, residential special schools with funding pressures.

8. Recommendations

Schools Forum are asked to:

- Consider and comment on the key elements identified to be consulted upon, based upon the current information available to the LA, including the identification of any additional elements for the LA to consider consulting on.
- Consider and comment on the proposed consultation arrangements, including providing a view on how information is provided to achieve the greatest engagement, including how consultation sessions are structured.

Officer Contact

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

Officer name: Martin Brock

Telephone no.: 01603 223800

Email: martin.brock@norfolk.gov.uk



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Report to Norfolk Schools Forum

Item No: 7

Report Title: Update to Scheme for Financing Schools

Date of Meeting: 02 July 2025

Executive Summary

Local authorities are required to publish schemes for financing schools setting out the financial relationship between them and the schools they maintain.

Changes to the local scheme are periodically required based on revisions directed by the Secretary of State, or for local changes approved through Schools Forum. As preparation for autumn consultation with schools, this paper summarises the current areas of proposed change for Schools Forum Members awareness and understanding.

There are no directed revisions for 2025-26 for amendment in the local scheme.

However, the local authority also proposes to consult with schools on changes to the local scheme relating to further clarification for leases in respect of IFRS16, and a change to allowing funds lodged by maintained schools in the non-BMP fund to be returned to them if they join the Building Maintenance Partnership (BMP) fund.

Schools Forum are asked to:

- **Consider and comment on the key elements identified to be consulted upon, based upon the current information available to the LA, including the identification of any additional elements for the LA to consider consulting on**
- **Provide comment to the LA to support and enable the preparation of consultation materials that the outcome of which will, in turn, be available to support the decision making of LA maintained Members as to updates to the Scheme for Financing Schools 2025/26 (as late, minor changes) and/or 2026-27.**

1. Background

- 1.1 Local authorities are required to publish Schemes for Financing Schools setting out the financial relationship between them and the schools they maintain.
- 1.2 Guidance is provided to authorities listing the items that must, should or may be included, and is issued under the School Standards and Framework Act 1998.
- 1.3 The local scheme is updated in the following circumstances:

Directed revisions – the Secretary of State may require the revision of part or any scheme. These revisions must be included in the local scheme using the text of the directed revisions.

Local revisions – for changes other than directed revisions, local authorities must consult with all maintained schools in their area and receive approval of Schools Forum members representing maintained schools.

- 1.4 For reference purposes, the current scheme is available on the Norfolk Schools website:
<https://www.schools.norfolk.gov.uk/school-finance/scheme-for-financing-schools>

2. Proposed updates

- 2.1 At this point in time, updates that the LA is proposing to consult on are detailed below, with the current draft of the proposed wording included in Annex A.

2.2 Leases – (Local updates)

The local authority proposes to add further clarification to the wording in section 2.8 of Annex J of the local scheme in respect of leases, further to the changes already made to the scheme in 24-25, in respect of Norfolk's requirements for IFRS16 leases.

2.3 Building Maintenance Fund – (Local updates)

The local authority proposes a change to the scheme in section 4.2 of the local scheme in respect of allowing non-BMP funds to be returned to a school if they opt back into the Building Maintenance Partnership (BMP) fund.

3. Consultation requirements

- 3.1 When making any changes to the scheme, other than directed revisions, local authorities must consult all maintained schools in their area and receive the approval of the members of their Schools Forum representing maintained schools.

4. Recommendations

Schools Forum are asked to:

- Consider and comment on the key elements identified to be consulted upon, based upon the current information available to the LA, including the identification of any additional elements for the LA to consider consulting on
- Provide comment to the LA to support and enable the preparation of consultation materials that the outcome of which will, in turn, be available to support the decision making of LA maintained Members as to updates to the Scheme for Financing Schools 2025/26 (as late, minor changes) and/or 2026-27.

Officer Contact

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

Officer name: Martin Brock

Telephone no.: 01603 223800

Email: martin.brock@norfolk.gov.uk



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Appendix A

Detail of proposed wording changes, including reference to the section of the current Scheme for Financing Schools.

Leases – (Local updates)

Section 2.8 of Annex J, current wording:

“Subject to government legislation on capital expenditure control, schools will have freedom to redeploy expenditure from their delegated budget into capital items. Schools must not enter into finance leases. Schools must not enter into operating leases without the approval of the Children’s Services Assistant Director - (Business and Compliance)”

Section 2.8 of Annex J, proposed wording:

“Subject to government legislation on capital expenditure control, schools will have freedom to redeploy expenditure from their delegated budget into capital items. IFRS 16 leases end the distinction between operating leases for accounting purposes. Under the Education Act 2002, all leases are now classed as borrowing and will require the Secretary of State for Education’s consent. Governing bodies do not need to make a specific request for consent where a lease falls under the general consent granted by the Secretary of State for Education. The types of assets granted general consent is listed in [The IFRS16 Maintained Schools Finance Lease Class Consent 2024](#)

Further conditions for reporting to Norfolk County Council include:

- New legislation is from 1st April 2024.
- Contracts/Leases that have more than 12 months to run must be recorded on Star Accounts.
- Value of contract/Lease must exceed £10,000 for the remaining life of the lease.
- Right of Use – the contract must confer on the school the right to direct the use of the asset in such a way that it is able to reap the economic benefits arising from the use of the asset.”

Building Maintenance Fund – (Local updates)

Section 4.2e current wording:

- For mainstream schools that do not contract into BMPP the total amount lodged should be up to a maximum of £650 per pupil on roll at the time of the previous October Census, or £360,000, whichever is the lower.

- For special schools that do not contract into BMPP the total amount lodged can be up to a maximum of £815 per place at the time of the previous October Census.
- Schools with community assets that are required to have a sinking fund for regular repair and maintenance of those assets e.g. swimming pools, Multi-Use Games Areas (MUGAs) etc, may also lodge funds in Schools Building Maintenance Holding Account.
- Once lodged, funds cannot be returned to the school. The funds can only be used to fund building maintenance expenditure.

Section 4.2e proposed wording:

- For mainstream schools that do not contract into BMPP the total amount lodged should be up to a maximum of £650 per pupil on roll at the time of the previous October Census, or £360,000, whichever is the lower.
- For special schools that do not contract into BMPP the total amount lodged can be up to a maximum of £815 per place at the time of the previous October Census.
- Schools with community assets that are required to have a sinking fund for regular repair and maintenance of those assets e.g. swimming pools, Multi-Use Games Areas (MUGAs) etc, may also lodge funds in Schools Building Maintenance Holding Account.
- Once lodged, funds cannot be returned to the school (unless the school opts back into BMPP). The funds can only be used to fund building maintenance expenditure.

Report to Norfolk Schools Forum

Item No: 8

Report Title: Norfolk Schools Forum Constitution and Ways of Working

Date of Meeting: 2 July 2025

Executive Summary

The Norfolk Schools Forum Constitution has been under review since January 2025 with two previous papers presented to Forum. The current constitution was last updated in March 2019. A refreshed draft constitution has been prepared which seeks to align the Schools Forum with the required regulations as well as incorporate current best practice. Once agreed, the final constitution will take effect from September 2025 to align with the new academic year.

Alongside the consideration of the constitution, the Forum are asked to consider the Membership for 16-19 representatives and the addition of formal working groups/subcommittees. In May, Schools Forum agreed to reduce the number of meetings a year to 5. To support this, consideration will also need to be given to the establishment of sub-committees and working groups referenced within the constitution.

Schools Forum are specifically asked –

- To discuss and comment on the draft Constitution noting the highlighted areas which are either additions or amendments from the current constitution.
- To consider & decide on the number of 16-19 representatives.
- To consider if the High Needs Working Group should be established and if the Early Years Consultative Group should become a formal working group of the Forum. Schools Forum are also asked to consider if there are any additional working groups that should be considered.
- Maintained Schools Forum representatives are asked to nominate a representative to sit on Finance Consultative Group.

1. Background

- 1.1. The constitution underwent its last review in March 2019.
- 1.2. The objective of this report is to present the draft constitution for consideration.
- 1.3. The DfE issue [guidance for Schools Forum](#) which is a combination of an operational and good practice guidance, details of powers and responsibilities, a summary of structures, and a self-assessment toolkit. Each of these have been used to create the updated version of the constitution.
- 1.4. It is the responsibility of the local authority to ensure the Schools Forum is constituted.

2. Constitution

- 2.1. Annexe 1 is the updated draft constitution for 2025-26.
- 2.2. The draft constitution consists of three sections – terms of reference, membership, and operating conventions – which have been

drafted using the current constitution, constitutional matters raised in the minutes of previous meetings, DfE guidance and those of other Local Authority constitutions, to ensure compatibility with good practice.
- 2.3. The constitution seeks to have sufficient detail to support the effective operation of the Schools Forum.
- 2.4. Schools Forum are asked to:
 - Discuss and comment on the draft Constitution noting the highlighted areas which are either additions or amendments from the current constitution.

3. Membership – 16-19 representative

- 3.1. **Non School Members:** Current Non-School Memberships consists of:-

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

- 3.2. 16-19 Representation: the constitution currently states there is one 16-19 representative. The request was made at a previous Schools Forum meeting to consider adding an additional 16-19 representative, due to the differences between college and sixth form funding.
- 3.3. The Forum is asked to discuss this 16-19 representation and decide if an additional representative is needed.
- 3.4. Adding an additional representative for the non-school members would maintain two thirds of the Forum represented by School and Academy members as required.

4. Sub-Committees and Working Groups

- 4.1. The constitution allows for the formation of subcommittees and/or working groups that will report to the Schools Forum. These groups will discuss specific topics outside of the Schools Forum meetings to support its functions, such as addressing particular issues and producing draft advice and decisions for the Forum to consider. These groups enable more detailed work than may be possible during a Forum meeting and allow for broader representation when appropriate. The constitution also permits the creation of task and finish groups focused on specific objectives with completion timelines of less than one year.
- 4.2. A review of all subcommittees and working groups will be undertaken annually.
- 4.3. The following working groups are proposed for 2025-26 to support the effective work of the Norfolk Schools Forum:
 - **High Needs Working Group:** To consider system transformation delivery, system pressures and opportunities, funding models, and other appropriate items requested by Forum
 - **Early Years Consultative Group:** to consider funding model, system sufficiency, increasing disadvantaged take-up, and other appropriate items requested by Forum or the wider representation of the group.
- 4.4. Schools Forum are asked to consider if the High Needs Working Group should be established, and if the Early Years Consultative Group should become a formal working group of the Forum. Schools Forum are also asked to consider if there are any additional working groups that should be considered.

- 4.5. It is proposed that the Schools' Forum also engage with the Finance Consultative Group, which is being reestablished and refocused for LA Maintained schools. A draft Terms of Reference (TOR) is currently under development, with the proposal that at least one maintained school Member of Forum will also be a member of the Finance Consultative Group. If agreed, representatives from maintained schools are requested to nominate at least one representative.
- 4.6. It is proposed that consideration is given to establishing more formal links between Schools Forum and Capital Priorities Group (a working group of officers, school representatives and local authority Members) that considers and advises the LA on mainstream and special / AP capital priorities, the planning and implementation and monitoring of the capital programme, along with links with place planning and estate related considerations.
- 4.7. If the working groups are agreed, terms of reference will be drafted for consideration and agreement at September Schools Forum meeting.

5. Summary of Considerations & Decision

- 5.1. Discuss and comment on the draft Constitution noting in particular the **highlighted areas** which are either additions or amendments from the current constitution.
- 5.2. Schools Forum are asked to consider & decide on the number of 16-19 representatives.
- 5.3. Schools Forum are asked to consider if the High Needs Working Group should be established and if the Early Years Consultative Group should become a formal working group of the Forum. Schools Forum are also asked to consider if there are any additional working groups that should be considered.
- 5.4. Maintained Schools Forum representatives are asked to nominate a representative to sit on Finance consultative group.

6. Background Papers

- 6.1. Schools Forum operational and good practice guide (March 2021):
[Schools forum operational and good practice guide - GOV.UK](#)
- 6.2. Schools Forum powers and responsibilities (March 2020):
[Statutory guidance template](#)
- 6.3. The Schools Forums (England) Regulations 2012
[The Schools Forums \(England\) Regulations 2012](#)

- 6.4. [The Schools Budget Shares \(Prescribed Purposes\) \(England\) Regulations 2002](#)
- 6.5. [School and Early Years Finance \(England\) Regulations 2014](#)
[School and Early Years Finance \(England\) Regulations 2014 - GOV.UK](#)
- 6.6. [Norfolk Schools Forum papers \(March 2025\)](#)
- 6.7. [Norfolk Schools Forum papers \(May 2025\)](#)

Officer Contact

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

Officer name: David Oldham

Telephone no.: 01603 306543

Email: david.oldham@norfolk.gov.uk



If you need this document in large print, audio, Braille, alternative format or in a different language please contact 0344 800 8020 or (textphone) 18001 0344 800 8020 and we will do our best to help.

ANNEXE 1
NORFOLK COUNTY COUNCIL
SCHOOLS FORUM
CONSTITUTION AND GUIDANCE 2025 – 2026

INTRODUCTION

The Norfolk Schools' Forum (hereafter referred to as "the Forum") is established as a requirement under 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 Operational and Good Practice guide 2021](#) the [Schools Forums \(England\) Regulations 2012](#) and the [School Budget Shares \(Prescribed Purposes\) \(England\) 2002](#).

This document is divided into 3 sections:

- 1. TERMS OF REFERENCE**
- 2. MEMBERSHIP OF THE FORUM**
- 3. OPERATING CONVENTIONS OF THE FORUM**

1. TERMS OF REFERENCE

1.1 Status of the Forum

The Forum is both a consultative and decision-making body, whose purpose is to advise the local authority in line with the Schools Forum (England) Regulations 2012.

In the event that any item within this constitution contradicts these regulations, the regulations will take precedence.

1.2 Power and responsibilities of the Forum

The respective roles of Schools Forums, local authorities and the DfE are summarised in the table below, the details of which [can be accessed here](#).

Function	Local Authority	Schools Forum	DfE
Formula change (including redistributions)	Proposes and decides	Must be consulted and informs the governing bodies, trustees and/or CEOs of all consultations Voting is restricted to school members and PVI representatives	Checks for compliance
Movement of up to 0.5% from the schools block to other blocks	Proposes	Whole forum 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)	Propose at least one month prior to invitation to tender	Gives a view and informs the governing bodies, CEOs and Trustees of all consultations	None
Financial issues relating to pupils with SEN, use of AP, EYFS provision and allocation of central government grants	Consult Annually	Gives a view and informs the governing bodies, CEOs and Trustees of all consultations	None
Minimum Funding Guarantee	Proposes any exclusions	Gives a view	Approval
De-delegation for mainstream maintained schools for allowable central budgets by the schools representatives of the relevant phase on behalf of the schools they represent	Proposes	Maintained primary and secondary school member representatives will decide for their phase.	Will adjudicate where Schools Forum does not agree LA proposal.

Function	Local Authority	Schools Forum	DfE
Central spend on and the criteria for allocating funding from falling rolls fund and significant growth fund to support the local authority's duty for place planning	Proposes	Whole forum decides	Will adjudicate where Schools Forum does not agree LA proposal
Contribution to responsibilities that local authorities hold for maintained schools (see guidance here)	Proposes	Relevant maintained school members decide	Will adjudicate where Schools Forum does not agree LA proposal
Central spend on and the criteria for allocating funding from: <ul style="list-style-type: none"> funding for significant pre-16 pupil growth, including new schools funding for good or outstanding schools with falling rolls where growth in pupil numbers is expected within three years 	Proposes	Whole forum decides	Will adjudicate where Schools Forum does not agree LA proposal
Central spend on: <ul style="list-style-type: none"> early years block provision funding to enable all schools to meet the infant class size requirement admissions servicing of Schools Forum contributions to authorities for functions held for all schools 	Proposes	Whole forum decides	Will adjudicate where Schools Forum does not agree LA proposal
Central spend on: <ul style="list-style-type: none"> capital expenditure funded from revenue – projects planned and decided on prior to April 2013 contribution to combined budgets – where the schools forum agreed prior to April 2013 existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013) prudential borrowing costs – approved prior to April 2013 	Proposes up to the value committed in the previous financial year and where expenditure has already been committed. (<i>Guidance withdrawn - August 2029</i>)	Whole forum decides	Will adjudicate where Schools Forum does not agree LA proposal
Central spend on: <ul style="list-style-type: none"> High Needs block provision 	Decides	None but good practice to inform forum.	None
<ul style="list-style-type: none"> Central Licences negotiated by the Secretary of State 			

Function	Local Authority	Schools Forum	DfE
Scheme of financial management changes	Proposes and consults governing body and Head or representative of every maintained school	Approves (School Members Only)	Adjudicates where Schools Forum does not agree LA proposal.
Membership: length of office	Decides	None (but good practice would suggest that they gave a view).	None
Voting procedures	None	Determines voting procedure.	None
Chair of Schools Forum	Facilitates	Elects (may not be an elected member of the Council or an officer).	None

2. MEMBERSHIP OF THE FORUM

2.1 Conduct

Members of the Forum shall act in accordance with the seven principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership.

2.2 Induction

All newly elected members shall receive an induction into the role and functions of the Forum.

2.3 Composition

The Forum will have ‘school members’, ‘academy members’ and ‘non-school members’ which reflect the makeup of Norfolk schools & academies.

Schools and academies members must number at least two thirds of the total membership of the Forum and the balance between maintained primary, maintained secondary and academies members must be broadly proportionate to the pupil numbers in each category.

No person who is an elected member or direct employee of Norfolk County Council is eligible to be nominated as a non-school’s member.

The structure and membership of the Forum will be reviewed annually, to ensure that it remains representative.

The Forum status, as of September 2025, is: **16** School & Academy Members and **6** Non School Members. A breakdown of representatives for each phase is set out in 2.5 and 2.7.

2.4 Terms of Office

Members of the Forum will serve for four years from the date of their election to the Forum.

Existing members can stand for re-election at the end of each term of office.

Election procedures apply if a member vacancy arises or the membership structure changes.

A Forum member remains in office until:

- a) the member's term of office expires;
- b) the member no longer holds the office which made them eligible for election, selection and appointment to the Forum;
- c) the member resigns from the Forum; or
- d) in the case of a non-schools' member, the member is replaced at the request of the body which the member represents or by another person nominated by that body;

whichever comes first.

2.5 School & Academy Members

The membership structure of School & Academy Members on the Forum should reflect most effectively the profile of education provision across the local authority.

Schools Forum currently has 16 School & Academy Members as follows:

- **3 Primary maintained representatives** - at least one governor and one headteacher or headteacher representative
- **1 Maintained secondary headteacher** or headteacher representative
- **1 Maintained special school headteacher** or headteacher representative
- **1 Maintained nursery school headteacher** or headteacher representative
- **8 Academy representatives** (headteacher, headteacher representative, governor or another Trust representative)
- **1 Special School Academy representative** (headteacher, headteacher representative, governor or other Trust representative)
- **1 Alternative Provision Academy representative** (headteacher, headteacher representative, governor or another Trust representative)

2.6 Election of School & Academies Members

Maintained Schools

Maintained Schools will have a total of 6 members on the Schools Forum:

- Primary Maintained representatives are to be elected by Norfolk LA Maintained Primary schools. Each school or, where federated, federation will be entitled to one vote.
- Special School Maintained representatives are to be elected by Norfolk LA Maintained Special schools. Each school or, where federated, federation will be entitled to one vote.
- Secondary Maintained representatives are selected by the Norfolk LA Maintained Secondary school.
- Maintained Nursery representatives are to be elected by Norfolk LA Maintained nursery schools. Each school will be entitled to one vote.

Where a vacancy occurs for a Maintained representative, the voting procedure set out in **Appendix 1.1** will be followed.

Academy representatives:

Academies will have a total of 10 members on the Schools Forum.

- Mainstream Academies members are to be elected by the CEOs of the Trusts that have at least one Mainstream Academy in Norfolk.
- Special School Academies members are to be elected by the CEOs of the Trusts that have at least one Special School Academy in Norfolk.
- Alternative Provision members are to be elected by the CEOs of the Trusts that have at least one Alternative Provision Academy in Norfolk.

Where a vacancy occurs for an academy representative, the voting procedure set out in **Appendix 1.2** will be followed.

2.7 Non-School Members

Alongside the 16 School & Academies Members, non-school members are elected to Forum. Non-School Members enhance discussions and ensure that the needs and interests of all the pupils in the local authority are adequately represented by the members of a Schools Forum.

There are currently 6 non-school members and the number in each phase is as follows:

- 1 16-19 providers
- 1 Early Years Private, Voluntary and Independent (EY PVI)
- 1 Church of England Diocesan representative

- 1 Roman Catholic Diocesan representative
- 1 Trade Union representative – primary
- 1 Trade Union representative – secondary

Each group will select the non-school member to represent them through a fair and transparent process. The Clerk of the Forum will keep a record the current selection process.

2.8 Substitute Members

Each member group shall identify substitute members who may attend on their behalf if they are unable to do so.

Substitutes must be named and recorded at the meeting of the Forum annually in September and can be approached by a member, or the Clerk, to attend in their absence.

Substitutes who have been properly named and appointed will have the same rights and responsibilities as those on whose behalf they are participating in the Forum.

2.9 Observers

Meetings of the Forum will start from the presumption that they are open for observers to attend. Observers are not entitled to vote and have no automatic right to speak; however, the Chair may allow contributions as appropriate.

Members of the public and other observers may be excluded from meetings or individual items which are deemed to be confidential at the discretion of the Forum.

2.10 Participation of Local Authority Officers

LA officers attend and participate in accordance with Schools Forum roles and responsibilities. These officers include:

- Executive Director of Children's Services or their representative
- Director of Strategic Finance (S151 Officer) or their representative
- Any person invited by the Forum to provide financial or technical advice
- Any person presenting a paper to the Forum
- Clerk
- LA Officers supporting the administration of Schools Forum

The Forum may consider inviting other LA officers to also attend the meeting to provide support for specific items of business. Where this is the case, the LA should meet the Forum's requests as far as possible.

LA officers will be responsible for maintaining the Forum's constitution and reporting to members on any relevant updates.

2.11 Resignations

A member may resign at any time by giving written notice to the Clerk and there is no limit to the number of terms an eligible member may serve.

2.12 Failure to attend meetings

Members who fail to attend three consecutive meetings without a satisfactory explanation will have their membership reviewed by the Forum.

The Forum has the discretion to remove them from the Forum membership by a majority vote at the next quorate meeting.

3. OPERATING CONVENTIONS OF THE FORUM

3.1 Ordinary Meetings

Ordinary meetings of the Forum will take place at Norfolk County Hall 5 times within an academic year, in accordance with the forward plan.

The Forum agrees the dates and times of all meetings annually, every June, and these will be published on the website.

To enable observers to attend a meeting of the Forum, meetings will be held in a room that is accessible and dates, times and locations of meetings are [published](#) in advance.

The clerk will arrange additional or urgent meetings at Norfolk County Hall or virtually.

3.2 Administration of Meetings

The Local Authority will convene forum meetings, clerk and record meetings.

The Clerk will make sure that copies of the agenda and any report, document or other paper considered at a meeting (not including confidential items exempt from publication in accordance with Schedule 12(A) of the Local Government Act 1972) are made available on the LA's website at least 7 days prior to the meeting.

Submission of late / urgent items may be considered, subject to the agreement of the Chair or Vice Chair and published as a supplementary agenda.

All report authors will be responsible for informing the Clerk in advance of the confidentiality status of reports to be included in the agenda.

A copy of the minutes will be published on the Forum website once they have been approved by the LA and agreed by the Chair and Vice Chair.

3.3 Role of Elected School Forum Representatives

Each member of the Forum presents the perspectives of their respective groups. Training will be provided to all representatives to ensure that the representation is appropriate and consistent.

To support effective communication, the Chair will summarise the decisions made at the end of each meeting of the Forum for members to share with the constituents of the group they represent. This will be prepared as an electronic document by an LA representative together with the Chair.

3.4 The Chair and Vice Chair

The Forum will elect a Chairperson and Vice-Chairperson annually at the January meeting.

Whenever feasible, the Chairperson and Vice-Chairperson should represent different groups within the Forum.

If both the Chair and Vice-Chair are absent from the meeting, the members present at the meeting will elect an Acting Chair, a role which may be undertaken by one of the members present.

In the case of a resignation of the Chair or Vice Chair, election of a replacement will be for the remaining period up to the end of the current academic year and may therefore be for a period of less than 12 months.

3.5 Election of Chair and Vice Chair

Candidates can self-nominate, and all nominations should be submitted to the Clerk by 30th November of the preceding year.

Where more than one nomination is received, an election will take place. Voting for the election of Chair or Vice Chair will take place by a simple majority of votes cast by individual members in advance of the meeting. The clerk will facilitate the vote.

3.6 Quorum

The Clerk will check for quorum at the start of each meeting and the Forum shall be quorate if at least 40% of the total membership is present (this excludes observers).

Decisions on the schools' budgets may not be taken unless 40% of the school members are present.

3.7 Voting in Meetings

Where a member votes, the member must only cast one vote and each member's vote will have an equal weighting.

All members are entitled to vote on all matters put to a vote, subject to the following restrictions:

- de-delegation from mainstream maintained schools' budgets is limited to the mainstream maintained schools' members where separate approval will be required by primary and secondary phase members.
- Amendments to the mainstream school funding formula, for which the voting is restricted by the exclusion of non-schools' members except for PVI representatives.
- Amendments to the Scheme for Financing Schools are limited to maintained schools' members only.
- Retention of funding for responsibilities held for maintained schools only is limited to maintained primary, secondary, and special members.
- Buy-back decisions for maintained nursery schools and maintained special schools is limited to maintained nursery and special members.

Voting on meeting proposals will be by show of hands and simple majority. In a three-way tie, the option with the fewest votes will be eliminated.

In the event of a tied vote, the Chair will make the final decision.

3.8 Urgent decisions outside of meetings

If an urgent decision is required and there is insufficient time to convene a full Forum meeting, the Chair will decide to implement the following emergency procedure, whereby all members will be contacted by email and asked to respond to the emergency motion before a given time.

The decision will stand if at least 40% of members have responded and the majority of those responding agree.

3.9 Sub Committee and Working Groups

The Forum can establish subcommittees and/or working groups to support it to exercise its functions, such as to discuss specific issues, and produce draft advice and decisions for the Forum itself to consider.

The Forum will set the terms of reference for groups, including membership and representation.

The list of subcommittees/working groups will be maintained by the Clerk and available on the Forum website. This will be reviewed annually.

The Forum should not delegate actual decisions or the finalisation of advice to a subcommittee or working group, to mitigate the risk of excluding legitimate points of view of Forum Members. Any recommendations or drafted decision of a subcommittee or working group must be approved by a quorate meeting of the Forum.

Reports of the work of any groups will be circulated to members for consideration at the next meeting of the Forum.

The Forum will have the option of establishing task and finish groups that focus on specific objectives where completion is within a timeframe of less than one year.

3.10 Annual Consultation

In accordance with Schools Forums Regulations 2012, the LA must consult the Forum annually in respect of the authority's functions relating to school funding including:

- Changes to the funding formula.
- The allocation of the Dedicated Schools Grant (DSG), including redistributions between blocks.
- Contracts where the LA is entering into a contract to be funded from the schools budget.
- Funding 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.
- Funding arrangements for the 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 top up funding.
- Central spend on children and young people with high needs.
- Funding arrangements for early years provision.
- Central spend on licences negotiated centrally by the Secretary of State.

- Administrative arrangements for the allocation of central government grants paid to the schools via the authority.
- Changes to the Minimum Funding Guarantee to go to the DfE for approval.
- Any other matter concerning the funding of schools as the Forum sees fit.

3.11 Amendment of the Constitution

Revisions to the regulations will automatically be incorporated into the constitution as and when prescribed by the Department for Education and the Forum will be notified.

If changes to the regulations result in there being more than one option or if the changes are optional, the Forum will be consulted prior to making any changes.

3.12 Expenses

Expenses relating to the operation of the Forum will be met by the LA and charged to the Schools Budget.

The LA shall reimburse expenses of members of the Forum when members submit appropriate claims, in connection with attendance at the meetings. Members are eligible to claim mileage, loss of earnings and the cost of care for dependents, subject to the approved LA rates.

APPENDIX 1

ELECTION PROCEDURES

1.1 Procedure for Maintained Schools

The vacancy will be advertised, and nomination papers will be made available to those eligible to vote for the current vacancy as laid out in the constitution.

If there is only one candidate for each position it will not be necessary to carry out an election and those candidates will be appointed to the positions.

If there are more candidates nominated than vacancies after the closing date, a vote will be taken from all eligible members.

The LA will provide all eligible schools with electronic ballot papers and copies of the expressions of interest of candidates, to be returned electronically within the timeline specified. A ranked order of preference system will be used to determine candidates elected.

Each eligible school or federation will be entitled to one vote. Headteachers and chairs of governors should agree as to how their school's vote will be cast.

1.2 Procedure for Academies:

The vacancy will be advertised, and nomination papers will be made available to those eligible to vote for the current vacancy as laid out in the constitution:

- Academies members representing mainstream academies must be elected to the Forum by the CEOs of mainstream Academies within the LA.
- Academies members representing special academies must be elected to the Forum by the CEOs of special academies within the LA.
- Academies members representing alternative provision academies must be elected to the Forum by the CEOs of alternative provision academies within the LA.

Each Academy trust will be entitled to one vote.

In the event that there is only one candidate for each position it will not be necessary to carry out an election and those candidates will be appointed to the positions.

Where there are more candidates than vacancies nominated after the closing date, a vote will be taken from all eligible members.

The LA will provide all eligible CEOs with electronic ballot papers and copies of the expressions of interest of candidates, to be returned electronically within the timeline specified. A ranked order of preference system will be used to determine candidates elected.

Norfolk Schools Forum Forward Work Programme – 2025/26 Academic Year

I – Information and Discussion

D – Decision

Autumn Term		Spring Term		Summer Term	
Wednesday 24 September 2025 (Edwards Room, County Hall) Strategic Oversight Report Provisional DSG Allocations for 2026/27 and Autumn DSG Consultation, including <ul style="list-style-type: none"> • Mainstream Schools' Funding Formula • Early Years Funding Formula • Scheme for Financing Schools updates 	 I D D	Tuesday 20 January 2026 (Cranworth Room, County Hall) Election of Chair/Vice Chair Strategic Oversight Report Final DSG Allocations for 2026/27 and Proposed DSG Budget 2026/27 Pupil variations	 D I D I	Friday 26 June 2026 (Cranworth Room, County Hall) Strategic Oversight report including <ul style="list-style-type: none"> • Reports from Subgroups (as appropriate) • Review of Proportionality and Membership • Schools Forum meeting dates 26-27 Dedicated Schools Grant Outturn and preparation for 26/27 consultation Annual Audit Report (Norfolk Audit Service) Updates on Scheme for Financing Schools (Financial Regulations)	 D D I D
Wednesday 26 November 2025 (Edwards Room, County Hall) Strategic Oversight report (including reports from Subgroups as appropriate) DSG consultation outcomes and recommendations on funding formulae Block transfers, if required Disapplication requests, if required De-delegation/Central Schools Services Block Centralised items	 I D D D D	Tuesday 17 March 2026 (Cranworth Room, County Hall) Strategic Oversight report (including reports from Subgroups as appropriate) Final pupil variations (only if changed from January)	 I I		