
SCHOOLS' FORUM

Tuesday 10 December 2024 – 10am

**Conference Suite
Centre for Excellence in Teaching and Learning,
Brierton Lane**

A G E N D A

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| 1. | Apologies | Chair |
| 2. | Minutes from Schools' Forum meeting on 15 October 2024 and Matters Arising | Chair |
| 3. | Permanently Excluded Pupils (PEXs) (Standing Item) | Emma Rutherford |
| 4. | Indicative School Block Budgets 2025/26 | Amanda Whitehead |
| 5. | Central School Services Budget Update 2025/26 | Amanda Whitehead |

Date and Time of Next Forum Meeting – to be confirmed

Schools' Forum Meeting

15 October 2024

Attendees:

Members

Carole Bradley (Chair) (Academy Primary)
 Gillian Hood (Academy Primary)
 John Hardy (Academy Primary)
 Colette Hogarth (Diocese RC)
 Phil Pritchard (Academy Primary)
 Toni Ray (Early Years)
 Caroline Reed (Academy Primary)
 Linda Richardson (Early Years)
 Sue Sharpe (Governor)
 Mark Tilling (Secondary)
 David Turner (Primary)
 Lee Walker (Academy Primary)
 Zoe Westley (Academy Special)
 Vicki Wilson (Diocese C of E)
 Leanne Yates (Academy Primary)

Local Authority Officers

Emma Rutherford (covering for
 AD Education)
 Fiona Stobbs (FS) (Inclusive
 Learning and SEND)
 Jo Stubbs (JS) (Democratic
 Services Team)
 Jane Watt (JW) (Children's
 Finance)

Agenda Item	Action
<p>1 Apologies -</p> <p>Chris Connor (Primary) Sandra Shears (Children's Finance) Amanda Whitehead (Emma Rutherford substituting in her LA capacity)</p>	
<p>2 Minutes of the Last Meeting – 24 September 2024 – Matters arising</p> <p>Minutes approved – with the following amendment:</p> <p>The equivalent top up for Springwell School is £9K per child (clarified by ZW)</p> <p>Confirm new membership of Schools Forum – no response to CB email re final vacancy. Vacancy therefore to be left open.</p> <p>Outstanding actions log – provide case studies for pupils placed in independent schools – Completed – ER to update during the meeting.</p>	
<p>3 Permanently Excluded Pupils (PEXs)</p>	

	<p>This is a standing item on the agenda for Schools Forum</p> <p>There are currently 82 students on roll at Horizon/Haven, 3 additional since the last meeting. The majority of the funding given to Horizon/Haven was now spent on staffing.</p> <p>MT queried the costs of alternate provision. JWa advised that this varied depending on the provider.</p> <p>As per a request at the previous meeting ER confirmed she would be happy to bring this as a standard item at Director's meetings. AW had previously highlighted this as an issue at Trust CEO meetings.</p> <p>Decision</p> <p>That the report be noted.</p>	
4	<p>Statutory Services Provided by the Local Authority</p> <p>At their meeting on 24 September 2024, Maintained School Representatives received a proposal from the local authority to charge £60 per pupil to cover the cost of statutory services that used to be funded from the Education Services Grant.</p> <p>Should approval not be given to the charge, the Council would need to disapply to the Secretary of State. This had been the case for the 8 previous financial years.</p> <p>MT noted that any lack of approval was in response to the principle of this being a budget cut and did not reflect the quality of services from the council or the relationship between schools and the Local Authority. The new Government should be made aware they could not continue passing cuts onto schools.</p> <p>Decision</p> <p>Maintained school representatives voted unanimously to not approve the proposal. (3 against; 0 for; 0 abstentions)</p>	
5	<p>Central School Services Block Transfer 2025/26</p> <p>At the previous meetings officers had suggested that any surplus CSSB funding be transferred to the High Needs Block to help with current deficit issues. This was an alternative to the default practice of transferring excess funding to the Schools Block to support individual school budgets.</p> <p>Members discussed this suggestion. Some were concerned that transfer to the High Needs Block would set a precedent and put additional pressure onto frontline services. DT queried recovery plan progress. JWa advised that officers had met with the DfE and highlighted the issues raised by</p>	

	<p>members at the previous meeting including the delay in the opening of the free school and resultant funding lag of half a million. So far there had been no formal response but while the DfE had expressed concerns at the outstanding deficit they had indicated that the Council would not receive support via any other government programme at this time. JWa explained that the Council's Section 151 Officer had expressed his ongoing concern on the deficit, particularly as there was such uncertainty on whether the current statutory override would continue beyond March 2025.</p> <p>Decision</p> <p>School representatives voted to transfer surplus CSSB funding for 2025/26 to the High Needs Block (10 for; 5 against; 0 abstentions)</p>	
6	<p>Growth Funding Update</p> <p>Following the previous meeting further work on growth fund models had taken place. Numbers would be assessed based on the October census and members would be advised when the final figures were available.</p> <p>Decision</p> <p>To note the update</p>	
7.	<p>Any Other Business</p> <p>Special Schools Cost Model</p> <p>Schools Forum had previously agreed to implement a cost model arrangement for special schools on a 3 year trial basis. As year 2 of this trial had begun, ZW requested that a working group be convened to look at the successes of the trial and whether it should be continued in future. Children's Services Committee had previously agreed to a 3% capped inflationary increase to special school funding for 2024-25 and if the cost funded model does not continue school reserves may be needed to fund salaries. This could impact on the Catcote, Horizon, Springwell and the new free school. JWa explained that a true-up process was underway for year 1 of the cost arrangement. This exercise would compare actual costs for year 1 to the cost model payments made to be sure schools were not being overfunded. ZW noted that her school had taken more children than budgeted for but had not taken more money as did not feel they needed it. She was not opposed to returning funding to the High Needs Block but wanted to know all affected schools were taking the same approach. The Chair suggested a plan be provided with checkpoints and key principles underpinning the cost model arrangement. JWa confirmed that a process note had been drafted and agreed with finance colleagues at Springwell and Catcote. ER to discuss with AW and agree how to take this forward for review.</p> <p>In-year admissions vacancies</p>	ER

OUTSTANDING ACTIONS LOG

Meeting	Description	Owner
15/10/24	“What Would it Take” Panel to be considered and established	ER
15/10/24	Meeting to discuss principles arising from year 1 and 2 of the Special School Cost Model Arrangement	AW / JWa / SSh

Financial Year 2024/25: Children's Services Committee – Log of Schools' Forum
Recommendations and Committee Decisions

Last Updated: 6 December 2024

Committee Date	Report	Recommendation and Decision Details
19/11/24	Dedicated Schools Grant (Former Education Services Grant rate per pupil) – Disapplication Request	<p>The Committee:</p> <ul style="list-style-type: none"> a) Agreed the 2025/26 funding rate at £60 per pupil/place. b) Agreed to submit the disapplication request to the Secretary of State to set the Education Services General Duties rate at £60 per pupil/place for 2025/26. c) Noted this will be the ninth consecutive year the local authority has applied for disapplication and that the previous eight applications have been successful.

**Report to Hartlepool Schools' Forum 10 December 2024
From Amanda Whitehead – Assistant Director Education**

Item 4: Indicative Schools Block Budgets 2025/26

1. Introduction

- 1.1 The purpose of the report is to provide information on the 2024/25 Schools Block indicative funding issued by the Education and Skills Funding Agency (ESFA) on 28 November 2024, along with options to be considered for setting Individual School Budgets (ISBs).
- 1.2 Information on the key ESFA funding and policy changes for schools is also presented in this report.

2. Background

- 2.1 ESFA have published indicative National Funding Formula (NFF) allocations for 2025/26. These allocations are based on pupil numbers from the October 2023 census multiplied by the PUF (Primary Unit of Funding) and SUF (Secondary Unit of Funding). Forum will recall that the publication of information is significantly later than usual, with information in previous years usually being received in July.
- 2.2 The NFF allocations exclude any funding to support the employer's national insurance (NI) increase in 2025/26. This will be managed as a separate grant and allocation details have not yet been confirmed.
- 2.3 In consultation with their Schools' Forum, local authorities are required to consider how they set ISBs for 2025/26.
- 2.4 Schools' Forum have already considered transfers to and from the Schools Block for 2025/26. These will be confirmed again later in this report.
- 2.5 Schools' Forum have also considered their proposed approach to setting both a Minimum Funding Guarantee (MFG) and Capping. Again, the impact of these considerations will be outlined later in this report.

3. Key National Funding Formula (NFF) Changes in 2025/26

- 3.1 Schools received separate grants for the 2024 to 2025 teachers' pay additional grant (TPAG), the teachers' pensions employer contribution grant (TPECG) 2024, and the core schools budget grant (CSBG) in 2024/25. These grants have been rolled into the NFF in 2025/26 so will be part of ISBs instead of being paid as separate grants.
- 3.2 After increasing the core factors in the schools NFF to mainstream the grants outlined at paragraph 3.1, most factors will increase by a further 0.5%. The full list of factor values is included at appendix A to this report.
- 3.3 The mandatory element for Minimum per Pupil Funding (MPPF) has increased from £4,610 to £4,955 for primary pupils and from £5,995 to £6,465 for secondary pupils. Forum Members will recall that the MPPF calculation includes the lump sum so that schools with lower pupil volumes are less likely to benefit from the MPPF guarantee.

- 3.4 There has been a change to the levels of Minimum Funding Guarantee (MFG) that can be applied in 2025/26. An MFG can now be applied in the range of -0.5% to 0.0% (previously 0.0% to 0.5%). The change is linked to the mainstreaming of the CSBG. As the CSBG was only a part-year grant in 2024/25, the amount of grant has been annualised before being added into the formula factors. This annualisation increases the baseline against which the MFG is calculated, meaning that schools were already receiving an increase in funding within the baseline itself. The level of MFG allowed then had to be reduced by ESFA to reflect the increased baseline.
- 3.5 Local authorities were required to bring their own formulae closer to the schools NFF from 2023 to 2024. This transition will continue in 2025 to 2026. As Hartlepool already mirrors the hard formula, this does not affect our budget setting approach.

4. Indicative NFF 2025/26

- 4.1 Indicative 2025/26 figures issued by ESFA are currently based on pupil numbers and characteristics from the October 2023 census. Allocations will be updated for the October 2024 census and reissued during week commencing 16 December 2024.
- 4.2 The following table shows the authority-level NFF Schools Block indicative allocation for 2025/26. The growth and any falling rolls allocations for 2025/26 have not yet been announced so these are excluded from the table below (and excluded from the 2024/25 comparison).

Schools Block	Pupil Numbers (Oct 2023)	2025/26 NFF £m
Primary	7,564	44.193
Secondary	5,709	42.936
Premises		0.588
TOTAL 2025/26		87.717

The **£87.717m** compares with the equivalent figure of **£86.963m** for 2024/25 (Schools block NFF plus the separate 2024 to 2025 teachers' pay additional grant (TPAG), the teachers' pensions employer contribution grant (TPECG) 2024, and the annualised core schools budget grant (CSBG) in 2024/25), an increase of 0.87% (subject to pupil number changes in October 2024).

- 4.3 Although the pupil numbers will be updated in mid-December to reflect the October 2024 census volumes, the Primary Unit of Funding (PUF) and Secondary Unit of Funding (SUF) remain the same. These are £5,843 and £7,521 respectively for 2025/26. Therefore, once census volumes are confirmed for October 2024, these will be multiplied by the PUF and SUF to establish Hartlepool's confirmed schools block allocation for 2025/26.
- 4.4 As the October census is now complete, updated pupil numbers are available internally from the Council's Data Team. These can be used to calculate an update of the indicative £87.717m in the table at paragraph 4.2 above. As at the October census, primary pupil numbers increase from 7,564 to 7,595 and secondary pupil numbers reduce from 5,709 to 5,629. The updated indicative funding position is shown in the table below. This would be a reduction of £0.420m against the indicative allocation from ESFA based on the October 2023 census.

Schools Block	Updated Pupil Numbers (Oct 2024)	Updated 2025/26 NFF £m
Primary	7,595	44.374
Secondary	5,629	42.335
Premises		0.588
TOTAL 2025/26		87.297

5. **Proposed Block Transfers**

- 5.1 At their meeting on 24 September 2024, Schools' Forum agreed to transfer 0.5% of the Schools Block funding to the High Needs Block. Based on the table at paragraph 4.4 of this report, the 0.5% would equate to £0.436m.
- 5.2 At the same meeting, Forum approved a new growth fund disbursement policy. Forum also agreed that any funding remaining in the 2025/26 growth fund following disbursement under the new policy would be used towards the 0.5% block transfer. The disbursement of growth funding is outside of the indicative ISBs presented in this report.
- 5.3 Unfortunately, ESFA have not been able to issue a growth calculator tool for 2025/26 so we are not in a position to estimate growth funding. Growth allocations are expected week commencing 16 December 2024.
- 5.4 At their meeting on 15 October 2024, Schools' Forum agreed that any residual funding in the Central School Services Block (CSSB) for 2025/26 would be transferred to the High Needs Block.

6. **Setting a Local Policy for MFG and Capping**

- 6.1 The regulations continue to allow a local policy for a minimum funding guarantee (MFG) and cap so that any excessive year-on-year changes can be protected against.
- 6.2 For 2025/26, a local MFG can be applied in the range of -0.5% to +0.00%. This is a change from 2024/25 when the maximum MFG could be set at +0.5%. The change is linked to the mainstreaming of the part year CSBG as explained at paragraph 3.4 of this report.
- 6.3 At their meeting on 24 September, Schools' Forum agreed that ISBs should be modelled based on the maximum allowable MFG (expected at the time to be +0.5%), along with an appropriate cap to ensure the affordability of the maximum MFG. Forum are being asked to confirm that Members remain committed to applying the maximum MFG which is now +0.0%.

7. **Recommendations**

- 7.1 Forum is recommended to:
- note the formula changes for 2025/26 outlined in this report;
 - confirm their approval to the application of a maximum 0.0% MFG, with the application of an appropriate cap to make this affordable for 2025/26 ISBs.

APPENDIX A: Funding Factor Increases

Factor	2024/25	2025/26
Basic Entitlement (AWPU) – Primary	£3,562	£3,847
Basic Entitlement (AWPU) – KS3	£5,022	£5,422
Basic Entitlement (AWPU) – KS4	£5,661	£6,113
IDACI Band A - Primary	£680	£685
IDACI Band B – Primary	£515	£520
IDACI Band C – Primary	£485	£490
IDACI Band D – Primary	£445	£445
IDACI Band E – Primary	£285	£285
IDACI Band F – Primary	£235	£235
IDACI Band A - Secondary	£945	£950
IDACI Band B – Secondary	£740	£745
IDACI Band C – Secondary	£690	£695
IDACI Band D – Secondary	£630	£635
IDACI Band E – Secondary	£450	£450
IDACI Band F – Secondary	£340	£340
FSM – Primary	£490	£495
FSM – Secondary	£490	£495
FSM Ever 6 – Primary	£820	£1,060
FSM Ever 6 – Secondary	£1,200	£1,555
Low Prior Attainment – Primary	£1,170	£1,175
Low Prior Attainment – Secondary	£1,775	£1,785
EAL – Primary	£590	£595
EAL – Secondary	£1,585	£1,595
Mobility – Primary	£960	£965
Mobility – Secondary	£1,380	£1,385
Lump Sum	£134,400	£145,100
Sparsity – Primary	£57,100	£57,400
Sparsity - Secondary	£83,000	£83,400

**Report to Hartlepool Schools' Forum 10 December 2024
From Amanda Whitehead – Assistant Director Education**

Item 5: Central School Services Block Budget Update 2025/26

1. Introduction

- 1.1 The purpose of the report is to provide an update for Schools' Forum on the 2025/26 Central School Services Block (CSSB) funding now indicative funding information has been issued by the Education and Skills Funding Agency (ESFA).

2. Background

- 2.1 Indicative National Funding Formula (NFF) allocations are normally published in July preceding the financial year to which they apply. Owing to a change in Government, ESFA announced there would be a delay, meaning figures were not available for the September Forum. Provisional allocations were finally published on 28 November.

3. Updates Following the September Forum Meeting

- 3.1 The provisional NFF allocation for the Central Services Block in 2025/26 is £0.691m.
- 3.2 Schools' Forum previously approved the following budget requirement for **historic commitments**. As per the regulations, values are frozen so unchanged from previous financial years.

Historic Commitment	Budget Requirement 2025/26	Description
Licences	£0.067m	Contribution to the Council-wide EYES system. The introduction of the EYES system has produced savings against the original CSSB funding of £0.77m. Therefore, the budget requirement in 2025/26 is a contribution of £0.067m towards the costs of these licences, effectively transferring the savings of £0.010m made back to the Schools Block. The EYES system supports a number of wider Council operations and funding from Council service teams, including Early Years to fund the Childcare module, supports the overall EYES system cost.
Termination Costs (Brierton School)	£0.031m	Covers the ongoing termination costs for ex-Brierton staff. This historic pension commitment will only diminish on the death of the ex-employees. Although the historic budget was set at £0.031m, the ongoing budget requirement is actually £0.039m. The difference is linked to an error in the original pension cost estimate provided upon the school closure. As the regulations do not allow for budgets for historic commitments to be increased, <u>Schools' Forum is asked to approve the original funding amount of £0.031m for 2024/25</u> . The remaining cost has been funded from DSG reserves in previous years.

3.3 Schools' Forum previously approved the following budget requirement for **ongoing commitments**.

Ongoing Commitment	Budget Requirement 2025/26	Description
Copyright Licences	£0.083m	The ESFA has negotiated copyright licences for schools with most copyright holders. The licences are purchased by the ESFA, who charge the local authority by way of a reduction in DSG. The licence cost for 2025/26 is estimated at £0.083m.
Admissions Service	£0.159m	It is the responsibility of the Local Authority to ensure that admission arrangements are compliant with the Admissions Code (2014). Local Authorities are expected to incur costs for requirements in relation to admissions and retain central DSG funding which contributes towards an Admissions Team. The budget requirement includes a 2% increase from 2024/25 to reflect the estimated pay award in April 2025.
Servicing of Schools' Forum	£0.046m	The cost of delivering Schools' Forum, including the preparation and attendance of at least four meetings per year. This includes staff costs for preparation of reports. The budget requirement includes a 2% increase from 2024/25 to reflect the estimated pay award in April 2025.
Statutory Services - Retained Duties	£0.215m	Details regarding this element of funding are covered in a separate report on Statutory Services presented to Schools' Forum at this same meeting. The budget requirement for 2025/26 is set at £16.18 per pupil (unchanged from 2024/25), with pupil volumes currently based on October 2023 school census data. The charge reflects the cost of services delivered by the local authority to all schools, including academies.

3.4 This gives a total budget requirement of £0.098m historic commitments and £0.503m ongoing commitments – a grand total of £0.601m.

3.5 As expected there will be a small amount of funding remaining of £0.090m (£0.093m in 2024/25). Forum have already approved transferring any surplus CSSB funding to the High Needs Block in 2025/26.

3.6 Forum Members are asked to note that the CSSB funding will be updated for October 2024 pupil numbers and published during week commencing 16 December. This funding update will affect the amount available for transfer to the High Needs Block, although not materially. The updated figures published in mid-December may also affect the budget requirement for both copyright licences and statutory services – retained duties. Again, this is not likely to be material.

4. **Recommendations**

4.1 Forum is asked to note the contents of the report.