

**DARLINGTON SCHOOLS FORUM**

Via TEAMS

Tuesday 11<sup>th</sup> March 2025, 2:00 to 4:00pm**AGENDA**

<b>Item No.</b>	<b>Item</b>	<b>Purpose of Item</b>	<b>Time</b>	<b>Decision required</b>	<b>Lead</b>
1	Welcome, introductions and apologies  Register/Declaration of business interests		2:00-2:05pm	No	Chair
2	Minutes of the meeting 14th January 2025 and Matters Arising and Outstanding Actions Log	Approve minutes and note actions	2:05-2:15pm	Yes	Chair
3	Budget Update 2024/25	Consider budget position	2:15-2:30pm	No	Emma Clennell
4	Budget Setting High Needs Block 2025/26	Consider high needs block budget setting and agree	2:30-2:50pm	Yes	Emma Clennell
5	High Needs Sub-Group Feedback including summary of meeting 16 <sup>th</sup> January 2025	Consider activity of the sub-group and summary of minutes 16 <sup>th</sup> January 2025	2:50-3:00pm	No	Paula Ayto
6	Union Facility Time	Consider Union Facility time arrangements.	3:00-3:20pm	No	John Hall, NASUWT National Executive Member
7	Forward Planning <ul style="list-style-type: none"> <li>• School Funding Formula</li> <li>• Core Schools Budget Historic Commitments</li> </ul>	Consider forward work plan activity	3:20-3:25pm	No	Chair
8	2025/26 Academic Year Meeting dates  Tuesday 7 <sup>th</sup> October 2025 2-4pm TEAMS Tuesday 13 <sup>th</sup> January 2026 2-4pm Town Hall Tuesday 10 <sup>th</sup> March 2026 2-4pm TEAMS Tuesday 2 <sup>nd</sup> June 2026 2-4pm Town Hall	Note meeting dates for 2025/26	3:25-3:30pm	No	Chair
9	Any other business		3:30pm		

Date of next meeting  
**3<sup>rd</sup> June 2025 2-4pm**  
**Town Hall**

**DARLINGTON SCHOOLS FORUM**

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**MINUTES OF MEETING**  
**14 JANUARY 2025**

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**MEMBERS PRESENT:** Chair M Butler (Education Village Academy Trust); Vice-Chair P Ayto (Reid Street Primary); J Davidson (Red Hall Primary); H Dummett (Federation of Darlington Nurseries); S Hudson (Rise Carr College); J Armitage (Rydal Academy Primary); S Welsh (Whinfield Primary); R Gartland (Education Village Academy Trust); J Blackham (Mount Pleasant Primary); S Gill (Haughton Academy); K Reid (Polam Free School); D Lythgoe (St Aidan's Academy); M Kane (Carmel College); G Hart (Northern Arch Learning Partnership); M Fryer (Hummersknott Academy); T Abbott (Bishop Hogarth Catholic Education Trust); J Skirving (St George's CofE Academy);

**OFFICERS IN ATTENDANCE:** Cllr. N Wallis; T Murphy (Assistant Director of Education & Inclusion); J Littler (Head of SEND Service for SEND & Inclusion); E Clennell (Finance Manager); E Marshall (Education Partnerships Officer - Clerk).

**APOLOGIES:** T Fisher (Northern Arch Learning Partnership); C Moss (Pierremont Pre School); J Aconley-Foster (Finance Officer); P King (Federation of Mowden Schools); M Ramsay (St Johns CofE Academy); H Ellison (Education Partnerships Manager)

**Also in attendance (observers):**

Heather Celik (Branch Secretary Darlington NASUWT); Cllr Anna-Maria Toms (CYP Scrutiny Committee member)

**1. Welcome, Introduction & Register/Declaration of business interests.**

The Chair welcomed everyone to the meeting and updated the meeting on apologies. It was noted that Glen Hart, Chief Financial Officer of Northern Arch Learning Partnership was in attendance on behalf of Tim Fisher, representing 16-19 Education. Richard Gartland was attending as a substitute representative for Marco Ramsay, representing Primary Academy education.

The Chair also welcomed Heather Celik, and Cllr Anna-Maria Toms as observers of the meeting.

There were no declarations of business interests.

The Chair raised an item of Any Other Business, Free School Meal (FSM) eligibility.

**2. Minutes of Meeting 8<sup>th</sup> October 2024 and Matters Arising**

The minutes were accepted as an accurate record.

**Matters Arising**

Matters arising from 8<sup>th</sup> October 2024 would be covered by the agenda; however, relating to **Union Facility Time**, the Assistant Director (TM) informed the Schools Forum that a meeting with Darlington union representation had taken place, and a paper will be presented at the next meeting.

**Action:** The Chair to liaise with Union representative.

DL raised a question relating to other Local Authorities' 'importer/exporter' status. TM confirmed that he would request this information from the regional group of directors at their next meeting.

**Action:** TM to request update on status at next regional group of directors meeting.

The Schools Forum was informed by the Chair that an actions log would be developed and shared at the next meeting.

**Action:** Clerk to develop action log for Chair's agreement prior to next Schools Forum meeting.

### **3. Schools Forum Membership Update and Election Procedures**

The Clerk explained the background to the update of election procedures, which was required to cover election of non-school diocesan members. The Chair suggested some changes to wording relating to trustees and proprietors on section 2.2 and 2.3 for overall consistency.

The procedures were agreed subject to changes suggested by the Chair.

The Chair asked the Clerk to update the meeting on membership vacancies. EM confirmed that the following vacancies exist:

- Secondary Academy Governor substitute vacancy
- Diocesan Representative substitute vacancy
- Non-school member PVI vacancy with substitute

**Action: The Clerk should progress the following:**

- Nominations to the Academy Governor substitute were requested through the Schools Forum and these should be sent to the clerk.
- A letter regarding the diocesan substitute will be sent to the Durham and Newcastle Diocesan Learning Trust.
- The PVI vacancy (standing since October 2024), will be brought to the attention of PVIs at the Early Years Strategy Group and at other relevant meetings.

### **4. Budget Update 2024/25**

The Finance Manager updated Schools Forum regarding the 2024/25 budget position as per the previously circulated report.

The Finance Manager outlined the key points from the report. Due to adjustments to the DSG allocation, the overall budget had altered by £84,303 to £119,759,629 prior to recouplement. The deficit reported to the October Forum was adjusted due to a revised reserve on the high needs block and an in-year reimbursement following census reconciliation across 3-4- and 2-year-olds, Early Years block. A Safety Valve payment was also received towards the repayment of the High Needs Block deficit.

Key movements in-year were highlighted:

- The in-year central schools block is estimated to be underspent by £41,328, due to fewer school appeals of £5,740 and Early Career Teachers of £7,925.

- Pre-16 Independent provision is anticipated to underspent by approx. £94,099, which is a reduction from the October report of £345,331. A projected growth of 6 pro-rated placements was offset by some pupils moving into alternative provision and to other Local Authority responsibility.
- The early years block is projected to be overspent by £14,348.
- The SEN inclusion expenditure has been shown to budget at this point in the term, subject to change.

#### **Recommendations**

- Forum noted the current budget position and the current high needs block position and the fluidity of this area.

#### **5. School Funding Formula 2025/26**

The Finance Manager updated Schools Forum regarding the 2025/26 School Funding Formula and Growth Fund, as per the previously circulated report.

The Finance Manager outlined the key points from the report:

- after the rates adjustment the school budget share for 2025/26 is £91,519,822
- the growth fund in 2024/25 was not set
- the Mainstream Core Budget grant included other inflationary costs; the Chair asked the Finance Manager to clarify what these costs include.

#### **Action: The Finance Manager to clarify what inflationary costs were covered by the additional Mainstream Core budget grant**

The Department has amended the minimum funding guarantee tolerance, which has historically been set in Darlington at the highest allowable level. We have been fully on the NFF factor values for a number of years because we haven't required all of the growth funding, and we have been able to balance the budget. However, due to various factors, the NFF is not affordable without using reserves or adjusting the factor values within the allowed tolerance of 2.5% above or 2.5% below the NFF.

The Finance Manager outlined 4 options to set a balanced school budget share for 2025/26 as set out in the previously circulated paper.

The Chair thanked the Finance Manager for the report and confirmed for the members that due to the timescales relating to receiving the budget share tool and the DFE submission deadline, there is insufficient time to consult more widely on the options for setting a balanced budget.

The Finance Manager confirmed that the NFF tolerances are set by the Department but the options allow for a policy decision which can also consider other regional positions going forward.

#### **Recommendations:**

- Forum agreed the recommendation to Schools Forum to accept option 1 for 2025/26, which allows for wider consultation on a policy position for budget setting 2026/27 at a future meeting; and
- Forum noted the funding formula budgets for 2025/26.

## 6. Budget Setting 2025/26

The Finance Manager updated Schools Forum regarding the 2025/26 Budget Setting as per the previously circulated report. The Finance Manager outlined the key points from the report. The Schools Forum noted the overall allocation prior to recoupment of £131,901,372. The schools budget share calculation and proposed growth fund were included in agenda item 5 above.

The Early Years block allocation will be updated for the January 2025 and January 2026 census; however, there is an expectation in the operational guidance that funding rates should be notified to providers by 28<sup>th</sup> February 2025. The Finance Manager outlined the proposed funding rates as set out in the paper previously circulated and that the Local Authority was consulting with the sector. HD summarised the current concerns of the sector of viability and sustainability of settings. The Chair expressed disappointment at the settlement position and requested that if anything is required from the Schools Forum to support this, that they should be informed. The Assistant Director acknowledged the impact of the proposed Early Years funding rates on settings and stated the Local Authority commitment to continuing discussions with the sector. The Finance Manager confirmed that the issues had been raised nationally but had not yet received any assurance of the change of this position.

### Recommendations:

- Forum noted the budget allocations for 2025/26 from the Department.
- Forum noted the proposed Early Years funding rates for 2025/26.
- Forum agreed the central allocation from the Early Years block.

The Finance Manager explained the central schools block allocation for historic commitments and drew attention to appendix 3 outlining the impact of the 20% reduction per year. The historic commitments at risk were noted and the Assistant Director confirmed that the Local Authority will prepare projections for discussion at a future meeting this year.

**Action:** A paper on central schools block allocation should be brought to a future meeting in 2025 (EC).

### Recommendations:

- Forum agreed the proposed usage of the Central Schools block in 2025/26 and noted the pressures in the historic commitments.

## 7. Safety Valve Plan

The Assistant Director confirmed that there is a positive current position on the deficit management plan and the Local Authority is expecting a high needs budget in-year balance. The work to continue this position includes consulting on the delivery plan of the SEND Strategy and Beaumont Hill Academy's expansion of placements. It was noted that Cabinet has also agreed an increased alternative provision offer with Darlington College. The Schools Forum noted the update.

**Action:** A paper relating specifically to the high needs budget should be brought to the March 2025 meeting of Schools Forum. (EC)

## 8. High Needs Subgroup Meeting Report

A summary of the High Needs (HN) Subgroup meetings held on 3<sup>rd</sup> October and 5<sup>th</sup> December was circulated with the report. Chair of the sub-group, Paula Ayto (Schools Forum Vice-Chair), provided some background information relating to discussions held by the subgroup.

To support the Finance Manager, the subgroup will review the proposals for the high needs budget in February 2025. This will include drilling down into use of VPP funding, costs and benefits, the current rate of out-of-area independent placements and the impact of EHCP top-up funding.

The subgroup also had a vacancy for a secondary school representative from Schools Forum and Su Gill's nomination (Principal at Haughton Academy) by the 11-19 partnership group was agreed.

The Schools Forum thanked the subgroup for its work.

## **9. Any Other Business**

### **FSM eligibility**

The Chair raised this issue that had been discussed at the 11-19 partnership group. It was noted that legacy from EVER6 means that some parents are still being receiving FSM-related payments when not being currently eligible. The Assistant Director confirmed that he would take this action from the 11-19 partnership group and report to Schools Forum. Cllr. Wallis asked Schools Forum to note that Cabinet are following this issue closely.

**Action:** Assistant Director to report on 11-19 partnership group action in relation to FSM/EVER6 query.

### **10. Time/Location of next meeting:**

The next meeting will be on Tuesday 11<sup>th</sup> March on TEAMS.

The Schools Forum noted that the remainder 2024/25 Academic Year dates are:

Tuesday, 3<sup>rd</sup> June 2025 – 2pm      Town Hall



**DARLINGTON SCHOOLS FORUM OUTSTANDING ACTIONS LOG**

**11 MARCH 2025**

Meeting	Description	Owner	Timescale	Status/Comments
January 2025	<b>1. Union Time</b> <ul style="list-style-type: none"><li>A fact-finding meeting will inform a paper which will be brought to the Schools Forum in Spring term 2025.</li></ul>	Chair to liaise with Union Representative	March 2025	<b>Completed.</b> Paper brought forward to Schools Forum March 2025
	<b>2. Membership &amp; Procedures</b> <ul style="list-style-type: none"><li>Nominations for replacement Secondary Academy (Governor) substitute representative</li><li>Nominations from Early Years PVI's for non-school member and substitute representatives</li><li>Nominations from Diocese for non-school member substitute representative</li></ul>	Clerk	December 2025	Letters to relevant schools and settings requested nominations
	<ul style="list-style-type: none"><li>Changes to election procedures requested by Chair</li></ul>	Clerk	March 2025	<b>Completed.</b> Circulated with March 2025 papers
	<b>3. Importer/Exporter Status of regional Local Authorities</b> <ul style="list-style-type: none"><li>To request information from regional LAs</li></ul>	Assistant Director	March 2025	Update at March 2025 Schools Forum meeting
	<b>4. Outstanding Actions Log</b> <ul style="list-style-type: none"><li>To develop an outstanding actions log</li></ul>	Clerk	March 2025	<b>Completed</b>
	<b>5. Schools Funding Formula 2025/26</b> <ul style="list-style-type: none"><li>The Finance Manager to clarify what inflationary costs were covered by the additional Main-stream Core budget grant</li></ul>	Finance Manager Chair/Clerk	March 2025	Update at March 2025 Schools Forum meeting
	<ul style="list-style-type: none"><li>Future Schools Forum meeting to be held to discuss SFF options</li></ul>	Finance Manager	March 2025	Update at March 2025 Schools Forum meeting
	<b>6. Budget Setting 2025/26</b> <ul style="list-style-type: none"><li>A paper on central schools block allocation should be brought to a future meeting in 2025</li></ul>	Finance Manager	October 2025	Paper prepared for a Schools Forum meeting in 2025.



	<b>7. High Needs Budget 2025/26</b> <ul style="list-style-type: none"> <li>A paper relating specifically to the high needs budget should be brought to the March 2025 meeting of Schools Forum</li> </ul>	Finance Manager	March 2025	Paper prepared for March 2025 meeting.
	<b>8. FSM Eligibility</b> <ul style="list-style-type: none"> <li>Assistant Director to report on 11-19 partnership group action in relation to FSM/EVER6 query</li> </ul>	Assistant Director	March	Update at March 2025 meeting.
October 2024	<b>1. Membership</b> <ul style="list-style-type: none"> <li>Nominations for replacement Secondary Academy representative</li> <li>Nominations for replacement Secondary Academy (Governor) substitute representative</li> </ul>	Clerk	December 2025	Complete but outstanding nominations
	<b>2. Union Time</b> <ul style="list-style-type: none"> <li>A fact-finding meeting will inform a paper which will be brought to the Schools Forum in Spring term 2025</li> </ul>	Assistant Director/Finance Manager/Chair	March 2025	<b>Completed</b>
May 2024	<b>1. Beaumont Hill Academy Memorandum of Understanding</b> <ul style="list-style-type: none"> <li>Due to commercial sensitivity, TM advised that the core aims and objectives which have been signed up to in the MOU, will be circulated. This will provide contextual and strategic position for Schools Forum.</li> </ul>	Assistant Director	January 2025	<b>Completed</b>
March 2024	<b>1. High Needs Block</b> <ul style="list-style-type: none"> <li>The Head of SEND to provide data on requests for assessment for discussion at a future high needs subgroup meeting and report to Schools Forum</li> </ul>	Head of SEND	June 2025	Verbal update to be provided at future Schools Forum meeting.
	<b>2. IDACI rates</b> <ul style="list-style-type: none"> <li>It was clarified that IDACI rates A-F from 2023/24 to 2024/25 have increased as per the NFF rates.</li> </ul>	Finance Manager	January 2025	<b>Completed.</b> 2024/25 data is based on the latest 2019 update. EC to update if any changes.
January 2024	<b>1. High Needs Block</b> <ul style="list-style-type: none"> <li>The Head of SEND to provide data on requests for assessment for discussion at a future high needs subgroup meeting and report to the Schools Forum.</li> </ul>	Head of SEND	January 2025	Discussed by high needs sub group February 2025.



**DARLINGTON SCHOOLS FORUM**11<sup>th</sup> March 2025**ITEM NO 3****BUDGET UPDATE 2024/25****Purpose of Report**

1. To update Forum regarding the 2024/25 budget position. The report is for information and therefore no decisions are required.

**Background**

2. Schools Forum was notified at the January 2025 meeting of a Dedicated Schools Grant budget (DSG) allocation of £119,006,003 and a budget was agreed accordingly. Adjustments to the funding were noted at the January Forum, bringing the overall allocation to £119,759,629.
3. There have not been any further adjustments to the DSG allocation since the January meeting.
4. The table below shows the adjusted DSG Funding prior to recoupment by the Department.

**Summary of Revised DSG Funding Allocation**

<b>DSG Block Allocation</b>	<b>Funding Confirmed at the January 2024 Forum</b>	<b>Adjustments to the DSG reported to the October Forum</b>	<b>Adjustments reported to the January 2025 Forum</b>	<b>Revised DSG Allocation</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Schools Block	85,642,394	0	0	85,642,394
Central Schools Block	893,007	0	7,363	900,370
High Needs Block	20,834,831	201,000	0	21,035,831
Early Years Block	11,635,771	636,829	(91,566)	12,181,034
<b>Total DSG Allocation</b>	<b>119,006,003</b>	<b>837,829</b>	<b>(84,203)</b>	<b>119,759,629</b>

**Reserves**

5. Schools Forum was notified at the January 2025 Forum meeting of the year-end budget position for 2023/24 with a deficit across all the blocks of £5,002,408 to carry into 2024/25. The reserve figures remain in line with those reported to the January forum meeting as shown in the table over.

### Summary of Reserve Balances for 2024/25 and in year Adjustments

Reserves	BF into 2024/25	Reserve Adjustments	Balance of Reserve	Safety Valve Payments	Balance of Reserve after Safety Valve Payments
	£	£	£	£	£
Schools Block	346,026	-150,000	196,026	0	196,026
Central Schools Block	578,277	0	578,277	0	578,277
Central Schools Block - PFI	44,139	0	44,139	0	44,139
High Needs Block	-5,557,792	0	-5,557,792	3,826,200	-1,731,592
Early Years Block	-413,058	215,270	-197,788	0	-197,788
<b>Total Reserve Balances</b>	<b>-5,002,408</b>	<b>65,270</b>	<b>-4,937,138</b>	<b>3,826,200</b>	<b>-1,110,938</b>

*NB – Deficits are shown in brackets in red, Surpluses are shown as a positive figure in black*

6. The DSG brought-forward reserve deficit after the Early Years reimbursement for 2023/24 now stands at £4,937,138 prior to Safety Valve payments.
7. To date we have received payments for the Safety Valve programme of £3,826,200 to be held towards the repayment of the High Needs Block deficit; after receipt of the funding the net deficit of the High Needs block is £1,731,592.

#### Budget Position – Appendix 1

##### Schools Block

8. The in-year schools block is estimated to be underspent by £25,047 at the end of the financial year; this is unallocated funding agreed in January Forum to be held in reserve.

##### Central Schools Block

9. The in-year central schools block is estimated to be underspent by £50,109; this is a further reduction from the January report of £8,781, due to usage for union cover £8,000 and slight slippage in the Early Career Teacher expenditure of £781.

##### High Needs Block

10. The High Needs block is currently projected to be online to budget, with most areas in line with the January report. The material movements are reported below:
  - a. The Resource Bases are projected to be underspent by £12,993; this is a reduction from the previous report of £30,377 due to a small movement in pupil numbers and ranges.
  - b. The PRU is projected to be underspent by £46,270; this is a further underspend from the January report of £22,121 and is due to lower than anticipated numbers above the commissioned levels.
  - c. We have seen an increase in the specialist equipment line due to a small number of high-cost bespoke pieces of equipment. There are further costs to come through this financial year, and we are projecting a small pressure of £2,117.
  - d. Mainstream school top-ups are estimated to be overspent by £365,663, which is an increase from the January report of £36,825. The number of pupils has increased by 5 for additional estimated growth, based on the number of pupils currently in the assessment

process. The overspend will be subject to further change as the outcomes of the assessments become known.

- e. Pre and post 16 independent provision are reported in line with the January report, although most of the invoices for the Spring 2025 term have not yet been received from the providers.

#### Early Years

11. The early years block is projected to be underspent by £33,989. The upfront PVI payments have been made for the Spring term and the school payments will be made once the census data has been reconciled. Across all the nursery entitlements we are projecting an overall underspend of £17,609, with 3- & 4-year-old provision estimated to be underspent by £268,947, 2-year-old provision projected to be overspent by £16,541 and under 2s working parent entitlement projected to be overspent by £234,797. These are subject to change as working parents take up the entitlements.
12. Based on the current information, the Disability Access Fund is projected to be underspent by £16,380.
13. Final reconciliation of the nursery entitlements will be made by the Department in June/July of 2025 following the census and the DSG will be adjusted accordingly.
14. The SEN inclusion expenditure has been shown to budget, the new arrangement is now in place, but it is too early to report any variances as the system will need to run for the Spring term prior to conclusions being drawn.

#### **Overall**

15. The in-year budget for 2024/25 across all the DSG blocks is currently projected to be underspent by £109,196; however, as outlined above, the Early Years block may be subject to clawback or reimbursement, the projected high needs expenditure includes growth projections which may differ from the final agreed plans, and we may have pupils moving into the Borough with additional support needs.
16. The overall estimated budget position for 2024/25 is a deficit of £4,827,492 across all blocks, including the brought-forward deficit from 2023/24, but prior to the Safety Valve payments.

#### **Recommendations**

17. That Forum notes the current budget position.
18. That Forum notes the current high needs block position and the fluidity of this area.

**Emma Clennell**  
**Finance Manager, Resources and Governance Group**



## DARLINGTON SCHOOLS FORUM

11<sup>th</sup> March 2025

ITEM NO 4

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### BUDGET SETTING HIGH NEEDS BLOCK 2025/26

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#### Purpose of Report

1. To update Forum regarding the proposed 2025/26 High Needs Block budget.

#### Forum Decision required

Forum is asked to:

- a) Note the report
- b) Discuss and agree the proposed DSG High Needs budget for 2025/26

#### Background

2. Schools Forum was notified at the January 2025 meeting that the Dedicated Schools Grant (DSG) allocation for the high needs block is £22,397,661, prior to initial recoupment of £5,062,000 for place funding, which is taken at source by the Department. The place change requests effective from September have been allowed for in the budget setting report (**appendix 1**), increasing the recoupment figure to £5,655,500. The increase reflects 70 additional places at Beaumont Hill Academy, 15 at Marchbank and 49 college placements. These figures will be adjusted by the ESFA in due course but for transparency, indicative figures have been included.
3. The funding equates to an increase (prior to recoupment) of £1,361,830, a 6.5% uplift in overall funding, this is after the import/export adjustment of £201,000 that has already been received in year. After additional recoupment of £603,500 the block has received a net increase of £758,330. (**shown in table 2, appendix 1**)

#### High Needs Budget

4. The indicative pupil numbers for 2025/26 were discussed at the High Needs Block Sub-group meeting on the 13th of February, with a view to discuss the growth levels and pressures within the block. The initial pupil numbers were drawn from various data sources, which show that the number of EHCPs has increased by 11.36% circa. Due to the significant increase, we were tasked by the sub-group to do some further analysis for growth projections prior to submission to School Forum.
5. Following the subgroup meeting, we have used the January 2024 SEN2 return to provide a baseline and compared this to the draft January 2025 return, whilst we have seen an increase of 11.36% in the overall numbers of EHCPs that we maintain, we have also seen a rise in numbers of EHCP's we maintain without funding, through Electively Home Education and for those who are Not in Education, Employment or Training (NEET), with funded growth of 8.9% circa (shown in appendix 2). The revised growth figures have been used in the proposed High Needs block budget for 2025/26.
6. We are projecting a pressure in the block of £218,493 circa, however we are hopeful that the percentage of Darlington pupils in our special schools will rise above the current levels of 75% and

reduce reliance on more costly independent provision. At the time of writing this report the September intake has not been finalised, and we have therefore factored in the placements at 75% with an allowance for further independent provision.

7. We are entering the third year of the Safety Valve programme and although we are projecting a pressured position due to demand, we are working closely with the sector to bring the 2025/26 budget into a balanced position.
8. As agreed in 2024/25 the budgets have been classified into the same categories as the debt plan i.e. Resource Based and SEN, Special Schools, Mainstream, MNSS or Independent, Post 16 & FE, Hospital and Alternative Provision (AP) and other.
9. The budget plan (appendix 2) shows the funding split by category prior to recoupment, so that we can view the share of the allocation and monitor against these. The additional places within our special schools have increased the proportion of the block allocated to special schools to 42% from 37%, we are showing a reduction in the proportion for independent provision from 19% to 16%, with all other lines moving marginally.
10. The main areas of note:
  - a) The place funding recoupment is subject to change after the import/export exercise and any further adjustments for place change requests.
  - b) Growth has been built into the plan to take account of the additional EHCP's levels at 8.9%. Additional top ups have been included for the increased place numbers in Beaumont Hill Academy, Marchbank Free School, and Darlington Colleges.
  - c) The hold position for the Travellers Service and Low Incidence Needs service are included in the budget in line with the previously agreed School Forum position. All the Outreach services and SCOS service have been built in based on the current models.
  - d) An indicative budget has been included for the Primary PEX pilot, with assumptions that the Vulnerable Pupil Panel funding will correspondingly reduce, although this is an area of pressure and further work will be carried out with the High Needs Sub-Group to look at options in this area.
  - e) The PFI premises factor for Beaumont Hill Academy has been adjusted to allow for inflationary increases and to ease the affordability gap.
  - f) Most of the high needs block budget is demand led and there is a significant risk that demand will outstrip the funding envelope further and that we may not be able to deliver efficiencies. Therefore, the block will need close monitoring to realise an in-year balance.

## **Recommendations**

11. That Forum agrees the high needs budget for 2025/26
12. That Forum notes the ongoing and increasing pressures due to demand within the high needs budget and that the budget proposal is linked to the Safety Valve

**Emma Clennell**  
**Finance Manager**  
**Resources and Governance Group**

**HIGH NEEDS BUDGET SETTING 2025/26 - Proposed**

Table 1

Budget Area	Proposed Gross Budget for 2025/26	Draft budget 2025/26	Actual Budget 2024/25	Movement VS 2024/25 Budget	Total Projected Spend 2024/25	Proposed 2024/25 Budget Variance to Outturn	Proposed Prorated Pupil Numbers 2025/26	Budgeted Numbers 2024/25	Actual Pupil Numbers @ January Forum
<b>HIGH NEEDS BUDGETS</b>									
Place Funding - Beaumont Hill	3,708,333	3,708,333	3,154,167	554,166	3,154,167	554,166			
Place Funding - Heathfield	179,667	179,667	190,667	(11,000)	190,667	(11,000)			
Place Funding - Hurworth	84,000	84,000	84,000	0	84,000	0			
Place Funding - Mt Pleasant	137,000	137,000	131,500	5,500	131,500	5,500			
<b>Place Changes Provision</b>		0	28,667	(28,667)	28,667	(28,667)			
Place Funding - Marchbank	587,500	587,500	500,000	87,500	500,000	87,500			
Place Funding - Post 16	969,000	969,000	782,500	186,500	782,500	186,500			
Place Funding Commissioned - Rise Carr College	450,000	450,000	400,000	50,000	400,000	50,000			
Place Funding - above 40 places	80,000	80,000	130,000	(50,000)	126,077	(46,077)			
Place Funding - Eldon House	190,000	190,000	190,000	0	190,000	0			
Place Funding - Redhall	116,000	116,000	136,000	(20,000)	136,000	(20,000)			
Top Up - Beaumont Hill - Pre 16	2,993,226	2,993,226	2,671,463	321,763	2,851,841	141,385	262	262	238
Additional Beaumont Hill	262,742	262,742	219,587	43,155	219,587	43,155			
Additional Marchbank	49,937	49,937	42,500	7,437	42,500	7,437			
Additional PRU	45,276	45,276	45,276	0	45,276	0			
Additional Eldon	12,543	12,543	12,382	161	12,382	161			
Top Up - Heathfield	38,000	38,000	67,333	(29,333)	13,769	24,231	6	10	2
Top Up - Hurworth	119,000	119,000	103,000	16,000	124,852	(5,852)	15	14	15
Top Up - Mt Pleasant	173,291	173,291	156,669	16,622	214,333	(41,042)	22	21	23
Top Up - Rise Carr	437,000	437,000	485,797	(48,797)	465,572	(28,572)	53	53	52
Top Up - Marchbank	344,167	344,167	285,000	59,167	358,333	(14,166)	22	19	22
Top Up - Eldon House	183,158	183,158	146,292	36,866	146,292	36,866	18	16	15
Top Up - Redhall Unit	127,041	127,041	135,958	(8,917)	128,000	(959)	14	15	13
TEPG/TPG Special Schools	283,525	283,525	241,175	42,350	241,175	42,350			
TEPG/TPG PRU	29,700	29,700	27,192	2,508	26,400	3,300			
Hospital Service	320,853	320,853	320,853	0	320,853	0	19	19	19
3.4% for Hospital Service	10,909	10,909			10,909	0			
Independent out of area placements									
Pre 16	3,115,509	3,115,509	3,288,540	(173,031)	3,194,441	(78,932)	45	46	47
Special Out of Area Pre 16	416,167	416,167	383,004	33,163	329,699	86,468	18	19	21
Beaumont Hill Post 16	301,041	301,041	283,000	18,041	286,590	14,451	23	22	22
Colleges	739,702	739,702	472,087	267,615	625,774	113,928	169	121	119
Out of Area Post 16	167,985	167,985	321,596	(153,611)	251,889	(83,904)	8	22	29
Post 16 Independent	394,831	394,831	620,674	(225,843)	113,872	280,959	7	11	7
Travellers Service	100,000	100,000	100,000	0	100,000	0			
Low Incidence Needs Service	259,733	259,733	259,733	0	259,733	(0)			
Autism Outreach	82,500	82,500	82,500	0	82,500	0			
Outreach - Mt Pleasant RBU	10,000	10,000	10,000	0	10,000	0			
Outreach - Northwood RBU	10,000	10,000	10,000	0	10,000	0			
Outreach - Beaumont Hill	52,000	52,000	58,000	(6,000)	52,000	0			
Vulnerable Pupil Panel - 6th Day Provision		0	100,000	(100,000)	140,046	(140,046)			
Primary PEX	138,000	138,000	0	138,000	63,692	74,308	6		6
Vulnerable Pupil Panel	20,000	20,000	50,000	(30,000)	88,292	(68,292)			
SCOS Post	25,553	25,553	25,553	0	27,705	(2,152)			
SEN Team	127,823	127,823	130,602	(2,779)	127,823	0			
Specialist Equipment	60,000	60,000	60,000	0	53,882	6,118			
Early Years Top Ups	206,065	206,065	59,500	146,565	160,439	45,626	25	8	22
Primary Top Ups	1,816,786	1,816,786	1,477,667	339,119	1,601,768	215,018	261	225	245
Secondary Top Ups	1,166,686	1,166,686	961,475	205,211	1,065,273	101,413	190	158	175
Out of Area Mainstream	109,003	109,003	143,237	(34,234)	90,819	18,184	16	16	22
SEN Transport	525,000	525,000	525,000	0	525,000	0			
School Forum Officer	52,537	52,537	52,537	0	52,537	0			
Other SEN/Alternative Provision	423,336	423,336	439,633	(16,297)	520,178	(96,842)	10	9	15
SEN Direct Payment	12,000	12,000	5,000	7,000	14,258	(2,258)	2	1	2
PFI element charged to high needs	336,375	336,375	227,515	108,860	371,959	(35,584)			
Inflation contracts	15,654	15,654	0	15,654	0	15,654			
Efficiencies	(218,493)	(218,493)							
Import/Export	0	0	201,000	(201,000)	0	0			
<b>Total High Needs</b>	<b>22,397,661</b>	<b>22,397,661</b>	<b>21,035,831</b>	<b>1,569,414</b>	<b>21,165,820</b>	<b>1,450,334</b>	<b>1,211</b>	<b>1,087</b>	<b>1,132</b>

DSG Allocation	2025/26	2024/25	Increase in Funding
HNB before recoupment	22,397,661	21,035,831	1,361,830
Recoupment	(5,062,000)	(4,891,501)	
<b>Total After Deductions</b>	<b>17,335,661</b>	<b>16,144,330</b>	<b>1,361,830</b>
		increase	6.5%

**Gross Budget split**

Row Labels	Sum of Draft budget 2025/26	Sum of Proposed Prorated Pupil Numbers 2025/26	Average Cost per Place	Percentage of the Overall Budget
AP	£1,947,074.00	90	£21,634.16	9%
Independent	£3,525,993.79	52	£67,807.57	16%
Mainstream	£4,699,719.00	567	£8,288.75	21%
Other	£525,000.00			2%
Post 16	£1,876,687.00	177	£10,602.75	8%
Special	£9,335,013.39	325	£28,723.12	42%
Resource Base	£706,667.00			3%
Efficiencies	-£218,493.00			-1%
<b>Grand Total</b>	<b>£22,397,661.19</b>	<b>1211</b>		

**HIGH NEEDS BUDGET SETTING 2025/26**

**AGENDA ITEM 4 - Appendix 2**

**Estimated Pupil Numbers 2025/26 HNB**

<b>Post 16</b>	<b>Leavers</b>	<b>Full year</b>	<b>Starters</b>	<b>Growth</b>	<b>From Sept</b>
FE In LA	2	114	33	7	154
FE OOB	3	17	2	0	19
FE Special Independent	1	2	0	0	2
Independent in OOB Post 1	1	0	2	2	4
Special Post 16 institution	2	0	0	0	0
Supported Internship	0	9	0	0	9
Special OOB Post 16	5	6	0	0	6
Special In LA BHA	3	18	3	3	24
<b>Pure Headcount</b>	<b>17</b>	<b>166</b>	<b>40</b>	<b>12</b>	<b>218</b>
<b>Prorated Headcount</b>	<b>5.61</b>	<b>166</b>	<b>26.8</b>	<b>8.04</b>	<b>206.45</b>

<b>Pre 16</b>	<b>Leavers</b>	<b>Full year</b>	<b>Starters</b>	<b>Growth</b>	<b>From Sept</b>
Independent in LA	1	9	0	1	10
Independent in OOB	3	31	0	4	35
Mainstream	49	371	0	95	466
Mainstream EY	1	20	0	7	27
Mainstream OOB	4	15	0	0	15
alternative	10	3	0	6	9
Special in LA BHA	17	215	21	41	277
Special OOB	2	17	0	0	17
DP	0	2	0	0	2
Eldon RB	3	14	1	3	18
Heathfield RBU	0	2	0	6	8
Hurworth RBU	1	15	0	0	15
Marchbank	6	18	0	3	21
Red Hall	4	8	0	7	15
Mountpleasant	2	21	0	1	22
<b>Pure Headcount</b>	<b>103</b>	<b>761</b>	<b>22</b>	<b>174</b>	<b>957</b>
<b>Prorated Headcount</b>	<b>33.99</b>	<b>761</b>	<b>14.74</b>	<b>116.58</b>	<b>926.31</b>

<b>Total Assumed plans in Sept</b>		<b>1,175</b>
	Prorated	1,133
Plus	Rise Carr PRU	53
Plus	Home Hospital	19
Plus	Primary PEX	6
	<b>Total Prorated</b>	<b>1,211</b>



**Schools Forum High Needs Monitoring Sub-Group**  
**Thursday 16 January 3-5pm**  
**Town Hall, COR3**

### Summary of Meeting

**Attendees and Apologies:**

Paula Ayto ( <b>Chair</b> )	Primary Academy Vice-Chair Schools Forum	Reid Street Primary School	Attended
Alex Nelson	Primary Academy	West Park Academy	Attended
Deb Hindson	Primary Academy	Heathfield Academy	Attended
Caroline Green	Special School	Beaumont Hill Academy & Marchbank Free School	Apologies
Sally Hudson	Maintained	Rise Carr College (PRU)	Apologies
Andy Gilpin	Non School/Post 16	Darlington College	Attended
Rachel Somerville	Secondary Academy	Hurworth School	Apologies

**Local Authority:**

Joanne Littler	Interim Head of Service for SEND & Inclusion	Attended
Emma Clennell	Finance Manager	Attended
Helen Watson	Senior Strategic Commissioning Manager – Children/Young People and SEND	Attended
Eleanor Marshall	Education Partnerships Officer	Attended

Item No.	Item Discussion
1	<p><b>Welcome, introductions and apologies</b></p> <p>Register/Declaration of business interests – None</p> <p>Any Other Business – None</p>
2	<p><b>Minutes of meeting held on 5 December 2024</b></p> <p>The minutes were accepted as an accurate record of the meeting. The Chair requested that an action log be developed prior to the next meeting. The actions from previous meetings were collated by the Chair and discussed.</p> <p><b>Matters Arising from previous meetings</b></p> <ul style="list-style-type: none"> <li>• <b>EBSA pilot</b> - SH was not in attendance to update on the transitional EBSA pilot ‘steps to secondary success’ project.</li> </ul> <p><b>Action: SH to update on EBSA pilot.</b></p> <ul style="list-style-type: none"> <li>• <b>Sensory SMART - OT update</b> - HW confirmed she provided feedback to the DCO. This action will be taken forward through the SEND Strategy Implementation Plan, which will also address any concerns if raised through Inspection. (Inspection report due for</li> </ul>

	<p>publication 4/2/2025). <b>Action: JL and HW to continue to liaise with DCO relating to Sensory SMART</b></p> <ul style="list-style-type: none"> <li>• <b>AV1 ‘robot’ pilot ‘AVA’</b> – HW confirmed that deployment has been mobilised in two schools following testing at Rise Carr College (RCC). Practical lessons are in scope and SH will be required to update. JL confirmed that she will review impact of the pilot.</li> </ul> <p><b>Action: SH and JL update on continuing deployment and impact of AVA pilot.</b></p> <p><b>Summary of Minutes</b></p> <p>It was noted that the minutes summary from 5<sup>th</sup> December 2024 was agreed electronically and submitted to the Schools Forum. This is now available on the website.</p>
3	<p><b>F/W Programme</b></p> <p><b>6-day cover</b> – It was noted that there has historically been no local area response to the legal requirement placed on Local Authorities (LAs) to provide full time education for primary children who experience a permanent exclusion. An Alternative Provision (AP) model is being explored.</p> <p><b>Exclusions</b> – The group discussed other LA strategies to recoup funding as per high needs guidance.</p> <p>The high needs budget includes a fund for request for support at the VPP. It was also noted that included should be a review of the criteria for funding and processes.</p> <p><b>Action: JL to discuss recommendation with CK.</b></p> <p><b>Action: The below actions were confirmed:</b></p> <ol style="list-style-type: none"> <li>1. <b>Explore options for alternative to current Primary PEX pilot (JL/HW)</b></li> <li>2. <b>Provide recommendations to Schools Forum relating to recalling PEX funding (EC/JL).</b></li> <li>3. <b>A review of the criteria and process for VPP funding. (CK/JL)</b></li> </ol> <p><b>Other:</b></p> <p><b>Post 16</b> - There have been declines to consultations and there are more complex pupils moving into adulthood from ISP. There are good news stories of young people in supported living and their skills improving from independent living. JL confirmed that as part of the SEND strategy, signposting from the Local Offer is a critical piece of work.</p> <p>The Chair confirmed that the Darlington EEF project will be initiated on 27<sup>th</sup> January 2025.</p> <p>The Chair noted that the LA position on attendance orders under the new bill, is still unknown.</p> <p>The Clerk confirmed that Primary Forum would receive training relating to the purpose of and the reporting of exclusions via the VPP AP and part time timetable data report.</p>
4	<p><b>Membership update</b></p> <p>The Schools Forum recommended Su Gill, Headteacher at Haughton Academy, to join the high needs subgroup.</p> <p><b>Action: Clerk to send details to Su Gill for next and subsequent meetings.</b></p>

5	<p><b>Resource Base Update</b></p> <p>The Chair confirmed that Primary Forum have requested representations from bases and services at future meetings. HW confirmed this is part of their contract and will be monitored.  <b>Action: HW to monitor representations from bases and services at Primary Forum meetings.</b></p> <p>HW/JL confirmed that the LA has received funding for an external peer review of outreach services. The LA are currently reviewing options, but an independent LA partner is preferred.  <b>Action: JL to feedback on peer review as this progresses.</b></p>												
6	<p><b>Outreach Review Update</b></p> <p>First term data and case studies will be reviewed, and any key themes will be brought back to the group at the next meeting.  <b>Action: Commissioning to present an overview of the term 1 impact and outcome information at the next meeting. HW/JL to update on peer review progress.</b></p> <p>It was noted that ELDON House / STRIVE was not funded for outreach services.</p> <p>The EBSA pilot model is on a train the trainer approach. RCC supports this, and as above SH will update at a future meeting. This however would not be high needs block funded.  <b>Action: SH to update on the EBSA Year 6 pilot</b></p>												
7	<p><b>High Needs Budget 25/26</b></p> <p>EC confirmed that the budget is being prepared and the subgroup will be consulted prior to the Schools Forum on 11<sup>th</sup> March 2025. The above feedback will be considered within the budget proposals.</p> <p>EHCP profiling for potential growth in out of area placements will be part of setting a balanced budget as there are limited options for block transfers.</p> <p><b>Actions: EC to prepare budget for next subgroup meeting (13<sup>th</sup> February 2025)</b></p>												
8	<p><b>Meeting Schedule/next meeting</b>        All future meetings will be at the Town Hall.</p> <table border="1" data-bbox="301 1514 1294 1877"> <thead> <tr> <th data-bbox="301 1514 740 1585">High Needs Subgroup</th> <th data-bbox="740 1514 1294 1585">Schools Forum Meeting date</th> </tr> </thead> <tbody> <tr> <td data-bbox="301 1585 740 1630"></td> <td data-bbox="740 1585 1294 1630"></td> </tr> <tr> <td data-bbox="301 1630 740 1697"> <ul style="list-style-type: none"> <li>• Thu 13th February 2-4pm</li> </ul> </td> <td data-bbox="740 1630 1294 1697"> <ul style="list-style-type: none"> <li>• 11th March 2024</li> </ul> </td> </tr> <tr> <td data-bbox="301 1697 740 1787"> <ul style="list-style-type: none"> <li>• Thu 3rd April 12.30-2.30pm</li> </ul> </td> <td data-bbox="740 1697 1294 1787"> <ul style="list-style-type: none"> <li>• 3rd June 2025</li> </ul> </td> </tr> <tr> <td data-bbox="301 1787 740 1832"> <ul style="list-style-type: none"> <li>• Thu 8th May 1.30-3.30pm</li> </ul> </td> <td data-bbox="740 1787 1294 1832"></td> </tr> <tr> <td data-bbox="301 1832 740 1877"> <ul style="list-style-type: none"> <li>• Thu 26th June 3-5pm</li> </ul> </td> <td data-bbox="740 1832 1294 1877"></td> </tr> </tbody> </table>	High Needs Subgroup	Schools Forum Meeting date			<ul style="list-style-type: none"> <li>• Thu 13th February 2-4pm</li> </ul>	<ul style="list-style-type: none"> <li>• 11th March 2024</li> </ul>	<ul style="list-style-type: none"> <li>• Thu 3rd April 12.30-2.30pm</li> </ul>	<ul style="list-style-type: none"> <li>• 3rd June 2025</li> </ul>	<ul style="list-style-type: none"> <li>• Thu 8th May 1.30-3.30pm</li> </ul>		<ul style="list-style-type: none"> <li>• Thu 26th June 3-5pm</li> </ul>	
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9	<p><b>Any other business</b>        None</p>												

## Schools Forum – 11<sup>th</sup> March 2025

The provision for funding for facility time to be delegated to schools was enacted in 2013, and since then in many authorities, facility time has been de-delegated to form a local authority central pool, which academies can also access.

Schools Forums are likely to revisit this issue on an annual basis, and the continuation or adoption of de-delegated arrangements should be made.

### The case for de-delegation

- Good industrial relations and constructive solutions to issues are vital for schools to be happy and productive workplaces and educational standards to be improved.

The NASUWT share the employers' desire for every school to be the best that it can be.

- There is plentiful evidence that where union representatives work collaboratively with employers, significant savings were made in the following areas: lower dismissal rates and voluntary exit rates that reduced recruitment costs, lower rates of employment tribunal cases, lower workplace injuries and lower workplace-related illnesses. In 2007, a government report found that facility time contributed to savings across the economy of up to £1bn.

- Section 168 of the Trade Unions and Labour Relations Act 1992 (TULRA) gives representatives of recognised trade unions the right to claim reasonable paid time off for specified purposes.

- The specified purposes include negotiations over collective bargaining, which is defined in law as relating to terms and conditions of employment, the physical conditions in which workers are required to work, engagement and termination of workers, allocation of duties, matters of discipline, trade union membership, facilities for officers of trade unions, and arrangements for consultation or negotiation.

- Other specified purposes include consultations over redundancies and Transfer of Undertakings (Protection of Employment) Regulations (TUPE) and this continues to be a driver of casework in the Stockton area as maintained school convert to academy trust status and indeed when academy school change trusts. Employers may also agree other functions which representatives may perform. The amount of 'reasonable' time off is not defined in the statute.

- De-delegated arrangements are the most cost-effective way for schools to meet their legal obligations.

- If funds are delegated, each individual school will need to fund the cover the additional requirements for representatives to be trained, and the supply costs of cover that will be required for the school-based representatives to undertake duties.
- The cover costs of training alone will be a minimum of £2000 per year (one representative for NASUWT, NEU, GMB, and UNISON each receiving 2-3 days training). The actual cost is likely to be significantly higher however, as the Employment Tribunal ruled in *Bennett v London Borough of Camden* that up to 36 days paid leave for training was reasonable.
- In addition to the visible work local trade union representatives undertake in schools and with the authority, there is also substantial hidden work primarily advising members and resolving issues before they even come to the attention of school managements.
- This unseen work saves schools considerable amounts of both time and money. If this facility is removed, it is likely that schools would see a considerable upsurge in cases.
- There are substantial benefits of working with local and regional teaching and support staff trade unions in cases involving individual employees, who are entitled to trade union representation.
- Effective employee relations between the authority, Academy Trusts, the school and the trade union helps to ensure that casework is quickly resolved via negotiations or consultation without the necessity for cases to result in an employment tribunal, which is costly for the school and employer or authority.
- Many workforce disputes, exit arrangements and effective solutions to workforce matters in schools are resolved at local level, again preventing the need for employment tribunal or court cases.
- Unions, authorities and academy trusts work in partnership to develop model policies and procedures suitable for schools and are consulted on guidance to schools on many aspects of national and local terms and conditions. These benefits also apply to academies, whether or not they buy HR services from the authority.
- Although many of the unions employ regionally-based staff to deal with high level cases, it is beneficial to all parties to resolve issues at the earliest opportunity. This is why supporting paid time off for local union representatives makes sound business sense.
- Schools within the local authority will be requested to release accredited union representatives appointed in accordance with the facility time agreements, in order to carry out the bargaining and representation functions across the authority.
- These accredited union representatives are normally more highly qualified and experienced than school-based representatives. De-delegated funds allows the release of these authority-wide

representatives, which all schools and academies can benefit from.

- Schools benefit from good employee relations across the authority as well as from the model policies, procedures and guidance, specifically for schools published by the authority in consultation with the unions.
- The importance of an adequate amount of facilities time cannot be overestimated. Section 1 of the ACAS Code of Practice says "Union representatives undertake a variety of roles in collective bargaining and in working with management, communicating with union members, liaising with their trade union and in handling individual disciplinary and grievance matters on behalf of employees.
- There are positive benefits for employers, employees and union members in encouraging the efficient performance of union representatives' work, for example in aiding the resolution of problems and conflicts at work. The role can be both demanding and complex. In order to perform effectively union representatives need to have reasonable paid time off from their normal job in appropriate circumstances."