

**Meeting:** North Tyneside Schools Forum      **Date:** Wednesday 13 November 2024  
 12:30 – 14:30

**Location:** The meeting will be held virtually and will be live streamed at the following link:  
<https://www.youtube.com/live/3Q2IVJrdILc>

## Agenda

| Ref. | Item   | Lead  |
|------|--|-------|
| 1    | Welcome and Apologies  |       |
| 2    | Attendance Register / Membership <i>Verbal Update</i>                                      | CP    |
| 3    | Minutes of the last meeting and Matters Arising <i>Circulated</i>                          | Chair |
| 4    | Declarations of Interest   | Chair |
| 5a   | Schools Finance Update <i>Circulated</i>   | JC/AB |
| 5b   | National Funding Formula and Outcome of Consultation <i>Circulated</i>                     | JC/AB |
| 6    | Annual Review of Schools Forum Constitution <i>Verbal Update</i>                           | CP    |
| 7    | Consideration for Special Leave for 23/24 Financial Year <i>Verbal Update</i>              | CP    |
| 8    | Any Other Business   | All   |
| 9    | Date and Time of Next Meeting:<br>Wednesday 15 January 2025 at 12:30pm via Microsoft Teams |       |

| North Tyneside Schools Forum Member Roles & Voting |                            |                                    |                                       |                   |                    |                      |  |             |
|--|----------------------------|------------------------------------|---------------------------------------|-------------------|--------------------|----------------------|--|-------------|
| de-delegation<br>Primary                           | de-delegation<br>Secondary | scheme for<br>financing<br>schools | consultation<br>on funding<br>formula | General<br>Duties | Retained<br>Duties | all other<br>matters | <i>last updated September<br/>2019</i> |             |
| 1  | 2                          | 3                                  | 4                                     | 5                 | 6                  | 7                    |  |             |
| <b>Voting</b>                                      |                            |                                    |                                       |                   |                    |                      | <b>Phase</b>                           | <b>Role</b> |
| <b>School Members</b>                              |                            |                                    |                                       |                   |                    |                      |  |             |
| x  |                            | x                                  | x                                     | x                 | x                  | x                    | First                                  | Head        |
| x  |                            | x                                  | x                                     | x                 | x                  | x                    | Primary                                | Head        |
|  | x                          | x                                  | x                                     | x                 | x                  | x                    | High                                   | Head        |
|  | x                          | x                                  | x                                     | x                 | x                  | x                    | Middle                                 | Head        |
|  | x                          | x                                  | x                                     | x                 | x                  | x                    | Secondary                              | Head        |
|  |                            |                                    |                                       |                   |                    |                      |  |             |
| <b>Other School Members Non Locality Based</b>     |                            |                                    |                                       |                   |                    |                      |  |             |
| x  |                            | x                                  | x                                     | x                 | x                  | x                    | Primary/ First                         | Governor    |
|  | x                          | x                                  | x                                     | x                 | x                  | x                    | Secondary/Middle                       | Governor    |
|  |                            | x                                  | x                                     | x                 | x                  | x                    | Nursery                                | Head        |
|  |                            | x                                  | x                                     | x                 | x                  | x                    | PRU                                    | Head        |
|  |                            | x                                  | x                                     | x                 | x                  | x                    | Special                                | Head        |
|  |                            |                                    | x                                     |                   | x                  | x                    | Academy                                | Other       |
| <b>Non Schools Members Non Locality Based</b>      |                            |                                    |                                       |                   |                    |                      |  |             |
|  |                            | x                                  | x                                     |                   |                    | x                    | 16-19 Providers                        | Other       |
|  |                            |                                    | x                                     |                   |                    | x                    | EY PVI                                 | Other       |
|  |                            |                                    |                                       |                   |                    | x                    | C of E Diocese                         | Other       |
|  |                            |                                    |                                       |                   |                    | x                    | RC Diocese                             | Other       |
|  |                            |                                    |                                       |                   |                    | x                    | Trades Union                           | Other       |

### Draft Timetable & Forward Plan 2024/25

| Date              | Activity   | Responsible     |
|-------------------|--|-----------------|
| 25 September 2024 | <u>Schools Forum Meeting</u><br>1. To include appointment of Chair and Vice Chair<br>2. Annual Review of Schools Forum Constitution<br>3. Schools Finance Update<br>4. Reports from Services for 25/26 Financial Year Proposal (if required)<br>5. Safety Valve Update | Schools Forum   |
| 3 October 2024    | School Census Day  | DFE/ESFA        |
| 30 October 2024   | Schools Census database closed. Checks and Validation commences.   |                 |
| 13 November 2024  | <u>Schools Forum Meeting</u><br>1. Annual Review of Schools Forum Constitution<br>2. Schools Finance Update<br>3. National Funding Formula and Outcome of Consultation<br>4. Consideration of Special Leave for 23/24 Financial Year                                   | Schools Forum   |
| 18 November 2024  | Deadline for submitting disapplication requests  | Local Authority |
| 18 November 2024  | Deadline for submitting disapplication requests if wish to move more than 0.5% of the Schools block  | Local Authority |
| 15 January 2025   | <u>Schools Forum Meeting</u><br>1. Local Authority Finance Update<br>2. Schools Finance Update<br>3. Consideration of Special Leave for 25/26 Financial Year<br>4. Scheme for Financing Schools Update (if applicable)<br>5. Safety Valve Update                       | Schools Forum   |
| TBC               | Submit final proposals re APT  | Local Authority |
| 24 January 2025   | Deadline for submissions of final 2025 to 2026 APT to ESFA   | Local Authority |
| 3 February 2025   | Cabinet Meeting for approval of 25/26 Schools Funding  | Local Authority |
| 17 February 2025  | Cabinet Meeting  | Local Authority |
| 28 February 2025  | Deadline for confirmation of Schools budget shares to mainstream maintained schools.   | DFE/ESFA        |
| 19 March 2025     | <u>Schools Forum Meeting</u><br>1. Schools Finance Update<br>2. Schools In Financial Difficulty  | Schools Forum   |
| 17 March 2025     | Cabinet Meeting  | Local Authority |
| 9 July 2025       | <u>Schools Forum Meeting</u><br>1. Schools Finance Update<br>2. Reports from Services for 26/27 Financial Year Proposal<br>3. Safety Valve Update<br>4. Responsibilities for Redundancy & Early Retirement Costs – Annual Update                                       | Schools Forum   |

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## Item 3

**Meeting** Schools Forum                      **Date** 25<sup>th</sup> September 2024

**Location** Via Microsoft Teams

**Present**

✓ Present  
D Deputy  
A Apologies  
O Absent

| Name             | Organisation                           | Representing         | 10.07.2024         | 25.09.2024         |
|------------------|--|----------------------|--------------------|--------------------|
| Angi Gibson      | Hadrian Park Primary School            | Primary              | ✓                  | D (Tim Jones)      |
| Anthony Gollings | St Thomas More                         | RC Diocese           | ✓                  | ✓                  |
| Claire Withers   | Fordley Primary School                 | Primary              | ✓                  | ✓                  |
| Colette Bland    | St Mary's RC Primary School (NS)       | Academy              | A                  | ✓                  |
| Colleen Ward     | Coquet Park First School               | Primary              | ✓                  | ✓                  |
| Daniel Jamieson  | Burnside Community College             | Secondary            | ✓                  | ✓                  |
| David Watson     | St Thomas More                         | Academy              | ✓                  | ✓                  |
| Diane Turner     | Tyne Coast                             | 16-19 Provider       | O                  | O                  |
| Finn Wilcock     | Southridge First School                | Primary              | ✓                  | A                  |
| Gavin Storey     | Cullercoats Primary School             | Primary              | ✓                  | ✓                  |
| Gillian Tawes    | Shiremoor Primary School               | Governor - Primary   | ✓                  | ✓                  |
| Jane Lowe        | Monkseaton Middle School               | Governor - Secondary | ✓                  | ✓                  |
| Joanne Thompson  | Holystone Out of School                | Early Years PVI      | ✓                  | ✓                  |
| Jonathan Heath   | John Spence High School                | Academy              | ✓                  | ✓                  |
| John Croft       | Sir James Knott                        | Nursery              | ✓                  | A                  |
| John Newport     | Marden Bridge Middle School            | Middle               | ✓                  | ✓                  |
| John Ord         | Greenfields Primary School             | Governor - Primary   | A                  | ✓                  |
| Justina Terreta  | Beaconhill Primary School              | Special Heads        | N/A                | ✓                  |
| Karen Croskery   | North Tyneside Student Support Service | PRU                  | A                  | ✓                  |
| Kelly Holbrook   | Longbenton High School                 | Secondary            | ✓                  | ✓                  |
| Kerry Lillico    | Grasmere Academy                       | Academy              | A                  | O                  |
| Laura Baggett    | Monkhouse Primary School               | Primary              | ✓                  | ✓                  |
| Lesley Griffin   | Wellfield Middle School                | Governor - Primary   | A                  | ✓                  |
| Louise Bradford  | C of E Diocese                         | C of E Diocese       | ✓                  | ✓                  |
| Matt Snape       | Marden High School                     | Secondary            | ✓                  | ✓                  |
| Peter Gannon     | Silverdale School                      | Special              | A                  | A                  |
| Phil Kemp        | Trade Unions                           | Trade Unions         | D (Claire MacLeod) | D (Claire MacLeod) |
| Philip Sanderson | Kings Priory                           | Academy              | ✓                  | ✓                  |
| Stephen Baines   | Holystone Primary                      | Primary              | ✓                  | ✓                  |
| Steve Wilson     | Whitley Bay High School                | High                 | ✓                  | ✓                  |
| Wayne Myers      | Richardson Dees Primary                | Primary              | ✓                  | ✓                  |
|                  |  |                      |                    |                    |

| <b>In Attendance:</b> |  |     |     |     |
|-----------------------|--|-----|-----|-----|
| Julie Firth           | Director of Children's Services                                    | NTC | ✓   | ✓   |
| Jon Ritchie           | Director of Resources  | NTC | A   | ✓   |
| Andrew Brown          | Principle Accountant, Finance                                      | NTC | ✓   | ✓   |
| Christina Ponting     | Senior Manager - Schools HR  | NTC | ✓   | ✓   |
| David Mason           | Head of Finance – Deputy S151 Officer                              | NTC | ✓   | ✓   |
| Diane Thompson        | Senior Accountant – Schools Finance                                | NTC | ✓   | ✓   |
| Jane Cross            | Senior Business Partner, Finance                                   | NTC | ✓   | ✓   |
| Ian Wilkinson         | Strategic Lead, Education and Inclusion Review                     | NTC | A   | ✓   |
| Lisa Ramshaw          | Assistant Director, Education and Inclusion                        | NTC | ✓   | A   |
| Mark Mirfin           | Assistant Director, Commissioning, Partnerships and Transformation | NTC | ✓   | ✓   |
| Mark Taylor           | Head of Service, Children and Families Commissioning               | NTC | N/A | N/A |
| April Gibbs-Thorn     | Administration Officer – Schools Forum                             | NTC | ✓   | ✓   |

## Minutes of Meeting

| Ref       | Item   | Action                   |
|-----------|--|--------------------------|
| <b>1.</b> | <b>Welcome and Apologies</b>   | <b>Julie Firth</b>       |
|           | <p>JF welcomed everyone to the meeting and issued a reminder that the meeting is live streamed to the public on the Authority's YouTube Channel.</p> <p>A reminder of roles and responsibilities for Forum Members was provided.</p> <p>See table above for apologies.</p>   |                          |
| <b>2.</b> | <b>Election and appointment of Chair and Vice Chair</b>  | <b>Christina Ponting</b> |
|           | <p>CP noted the yearly election of a Chair and Vice Chair for Schools Forum. Positions held for a 12-month period.</p> <p><b>Election of Chair</b></p> <ul style="list-style-type: none"> <li>• Nominations were requested.</li> <li>• David Watson was nominated for position of Chair. This was supported by Forum.</li> <li>• David Watson was duly elected as Chair.</li> </ul> <p><b>Election of Vice Chair</b></p> <ul style="list-style-type: none"> <li>• Nominations were requested.</li> </ul> |                          |

|           |   |                          |
|-----------|---|--------------------------|
|           | <ul style="list-style-type: none"> <li>Jonathan Heath was nominated for position of Vice Chair. This was supported by Forum. Jonathan Heath was duly elected as Vice Chair.</li> </ul>  |                          |
| <b>3.</b> | <b>Attendance Register / Membership</b>   | <b>Christina Ponting</b> |
|           | <p><b>Attendance:</b></p> <ul style="list-style-type: none"> <li>See table above.</li> </ul> <p><b>Membership:</b></p> <ul style="list-style-type: none"> <li>Forum welcomed new member - Justina Terreta, Special School Heads Representative.</li> <li>CP outlined that there is a current vacancy for membership, and confirmed this will be discussed with the specific locality outside of Forum.</li> <li>A number of memberships requiring renewal will also be contacted outside of Forum.</li> </ul>   |                          |
| <b>4.</b> | <b>Minutes of the last meeting and Matters Arising</b>  |                          |
|           | <p>Minutes of the last meeting were agreed as an accurate record of the meeting.</p> <p>Matters arising to be addressed in the Schools Finance Update.</p>  |                          |
| <b>5.</b> | <b>Declarations of Interest</b>   |                          |
|           | None  |                          |
| <b>6.</b> | <b>Annual Review of Schools Forum Constitution</b>  | <b>Christina Ponting</b> |
|           | <ul style="list-style-type: none"> <li>CP explained that each year a consultation and review is carried out on the Schools Forum Constitution, and this is informed by DfE guidance.</li> <li>As the DfE guidance is often eagerly anticipated but not received, it means that the consultation and review is deferred to the November 2024 Schools Forum meeting.</li> <li>CP suggested that a formal decision is made to move the consultation and review to each November meeting on a permanent basis.</li> </ul> <p><b>Recommendations</b></p> <p>Schools Forum is asked to:</p> <ul style="list-style-type: none"> <li>continue with annual review and consultation and move this to each November meeting.</li> </ul> <p><b>AGREED</b></p> |                          |
| <b>7.</b> | <b>Schools Finance Update</b>   | <b>Andrew Brown</b>      |
|           | <p>AB talked through the presentation which provided an update on progress against 2024/25 Budget Monitoring 1 for schools.</p>   |                          |

### **2024/25 Schools Budget Monitoring 1**

- 2023/2024 had a financial year-end deficit of £2.930m. It should be noted that as North Tyneside had received additional Schools in Financial Difficulty funding of £1.868m from the DfE, the underlying deficit figure would have been £4.798m.
- In terms of 2024/2025 budget plans, there is a projected deficit of £9.707m across maintained schools; an increase of £6.777m from the reported £2.930m year-end deficit balance for 2023/24.
- It is crucial that Schools and the Authority work closely to complete the 2024/2025 Budget Monitor 1 to gather accurate financial information. The aspirational deadline is 31 October 2024.
- AB noted that there have been issues with the financial system migration, and the Authority is working very hard with the Schools and SBS colleagues to resolve the system issues.
- The Finance team would like to thank Schools, Leaders and staff for their patience. Further communications will be issued.

### **2024/2025 Deficit Schools**

- The projected budget deficit of £9.707m includes 16 deficit schools.
- There are 7 new schools, 2 in structural deficit, and 3 schools identified for SRMA support.
- Deficit clinics are taking place, and 5 remaining clinics are scheduled for September 2024.
- Actions from the deficit clinics will be reviewed with the identified schools and once the Budget Monitor 1 projection has been reached, Authority staff will be reviewing and issuing License Deficit Agreements as soon as possible.
- A Schools Forum Finance sub-group will be held on Friday 30 September 2024. A total of 6 schools will be coming to the meeting to undertake Schools in Financial Difficulty bids and the team look forward to meeting the schools.

### **SRMA Feedback from Schools**

- As previously noted in Schools Forum, surveys have been issued to all schools who have taken part in the SRMA process.
- There is a constant plea to schools to fulfil feedback and thereby inform future processes. Some feedback highlights on the SRMA procedure were listed as below:



- a supportive non-threatening process
- an opportunity to review VFM and Staffing Structures
- helps to highlight funding issues
- helpful benchmarking
- lots of information required
- assurance for school and governors
- The process is very much an advisory one and schools are required to provide a significant amount of information as was noted in the feedback. AB stressed that as much information that can be put in, will be significantly reflected in what is gained from the process.
- There is a template that Finance and other staff provide to the designated SRMA before their visit. Moving forward and learning from the feedback received to date, this template will be shared with schools before they receive a visit.
- AB outlined his thanks to Heads across the Borough for their co-operation and collaboration with the Finance Team.

#### **DISCUSSION**

- Anthony Gollings wished to discuss the SRMA visits already having taken place and queried the expectation of schools following those visits and asked if there is an expectation for schools to set balanced budget plans this year/next year.
- AB noted that an SRMA Visit will not immediately reverse a school's position. The SRMA is a health check, whereby it gives assurance to the involved school that they are doing everything in their power to focus on efficiencies. The visit gives assurance that the school is doing everything in their power to address those issues deemed as controllable. Things that are uncontrollable would include government legislation or funding regimes. The SRMA does not list specific actions, it is considered a health check.
- The Chair asked if the feeling is that the vast majority of schools are doing the right things. AB noted that with regards to exit reports from SRMA's these have only contained minor recommendations. It is free advice from the SRMA, they are trusted and experts in their field. It is considered a health check.
- Jon Ritche wished to note that in the discussions with DfE as a Local Authority around how we address some of the challenges being faced, if we were not using the SRMA process it would make the request for additional funding a much more difficult process. Jon stressed the need to continue the process.

|                  |   |  |
|------------------|---|--|
|                  | <p>The SRMA process indicates we are taking all reasonable steps to address challenges and strengthens our hands.</p> <ul style="list-style-type: none"> <li>• Stephen Baines commented that as a school who had taken part in the SRMA process, it was very reassuring to know that the school was not being profligate with their money. There were no specific recommendations.</li> <li>• It was a very useful process and exceptionally reassuring to the Governors to understand that the school was being as careful as they could be.</li> </ul> <p><b>Recommendations</b></p> <p>Schools Forum is asked to:</p> <ul style="list-style-type: none"> <li>• acknowledge the pressure on schools and the update on budget monitoring 1</li> </ul> <p><b>NOTED</b></p>  |  |
| <p><b>8.</b></p> | <p><b>DFE Safety Valve Update</b></p> <p><b>Intervention Programme Update</b> <span style="float: right;"><b>Jane Cross/Mark Mirfin</b></span></p>  |  |
|                  | <p><b>2024/2025 High Needs Block</b></p> <ul style="list-style-type: none"> <li>• Jane Cross and Mark Mirfin talked through the presentation.</li> <li>• It was noted that the High Needs block ended 2023/2024 with a pressure of £10.494m. This included Safety Valve funding of £9.750m received up to 31 March 2024.</li> <li>• 2024/2025 is the second year of the Safety Valve intervention programme and the forecast for the High Needs Block is £10.516m, representing an anticipated pressure of £0.279m against the original DSG Management Plan.</li> <li>• MM stressed the complexity of the budget and gave an outline of some of the key pressures. <ul style="list-style-type: none"> <li>a) Higher numbers of children and young people educated in maintained special school provision (note that the Authority is now in line with regional but higher than national).</li> <li>b) On completion of the DSG management plan, a review had been carried out on commissioned services, and those commissioned services sitting under Schools, have now been TUPE'd into the Authority. This was recognised as being a sensitive time and the process took longer than anticipated thus resulting in the necessary delays of the review of funded commissioned services.</li> </ul> </li> </ul> |  |

Savings coming from that review came from modelled efficiencies relating to a single point of contact; a Centre of Excellence with a single point of access to a range of services.

Phase One is now complete, and all colleagues have undergone TUPE Transfer into the Authority under Lisa Ramshaw. Phase Two has commenced and is now looking at the review of those services and what would be behind a single access point.

- c) There are a higher number of EHCP plans than expected and forecast in the DSG management plan. It should be noted that growth has stemmed but that the rate of that growth is higher than expected. The growth in EHCPs for 2022 and 2023 were lower than regional and national.

The DfE has been advised that the Year One groundwork has been completed but it will take time to see the impact of that work. For example, a lot of work has been carried out on the development in graduated approach and the Early Years Inclusion service.

- The second of three returns have now been made for 2024/25; the Authority awaits the outcome from the second return, including on whether the DfE will release the second of three payments. As the Authority submitted its second return on time, and because the DfE approved the first return, the payment after the first return will be released by 31 October 2025.

#### **DSG Management Plan**

- The Authority have committed to a remodelling of the DSG management plan as good practice. The Authority has launched a survey, and schools are encouraged to complete and return.
- The Authority wants to look at alternative initiatives and mitigations which could be explored through an Invest to Save model that would make a difference to school settings, children, pupils and families.
- MM encouraged that schools complete the survey between now and October half term.
- The SEND Inclusion Strategy runs to the end of 2024. This survey will co-inform the SEND Inclusion Strategy moving forward.

### **NT Local Funding Consultation**

- A delay in information on provisional funding allocations from the DfE has caused a delay in the timeline of formal consultation.
- The formal consultation will be opened on 2025/2026 funding and will focus on the concept of a few areas:
  - a) the continued use of the National Funding Formula.
  - b) if schools are happy for the Authority to set minimum funding guarantees and capping based on affordability.
- The Authority would also like to consult on options around growth and falling rolls. Some comments from Headteachers have queried if there is scope to move even further away from National Funding Formula with these two amounts.
- The Consultation will again focus on the transfer of 0.5% from the Schools Block to the High Needs Block. The Authority is in current discussions with the DfE on alternative options to allocate the 0.5% and initial conversations have indicated there may be a way to disapply the minimum funding guarantee.
- All topics will be raised with the Schools Forum Sub-Group on 30th September.
- The consultation will be live from 7th -25th October 2024.
- The result of the consultation will be presented to Schools Forum on Wednesday 13th November 2024 and the official vote on the 0.5% transfer will take place.

### **DISCUSSION**

- The Chair noted it would have been much better if indicative figures had been received from the DfE and this would enable informed comment/decisions around the 0.5% transfer in terms of affordability and pressures. The delay is frustrating. The Chair noted that he had raised the question if the consultation timeline could be delayed and therefore consultation close could be extended. To date, it has been advised a delay is not possible.
- Jane Cross empathised with colleagues and schools' frustration and stated that she would raise this point again as a challenge with contacts at the DfE and EFSA.

### **Recommendations**

Schools Forum is asked to:

**JC**

|  |  |  |
|--|--|--|
|  | <ul style="list-style-type: none"> <li>• acknowledge the plans for consulting with schools on the 2025/26 National Funding Formula<br/><b>NOTED</b></li> <li>• acknowledge the pressure on the High Needs block and the update for the Authority's Safety Valve Intervention Programme.<br/><b>NOTED</b></li> </ul>  |  |
|  | <p><b>Any Other Business</b></p>   |  |
|  | <p><b>Monkseaton High School</b></p> <p>Julie Firth gave a verbal update on the position of Monkseaton High School.</p> <ul style="list-style-type: none"> <li>• Prepublication consultation commenced last week, around the future of Monkseaton High School with meetings being held with the Governing Body, Headteacher and staff team as well as pupils.</li> <li>• A series of consultation meetings have been arranged with parents of the school in the coming weeks. The consultation is open to 30 October 2024, and we are looking for viable options on how to continue to keep the school open (option one), as an alternative to school closure (option two).</li> <li>• The Authority has pushed the challenge back to the DfE in terms of a request to revisit Academy Trusts to see if anyone would be interested in coming forward to secure the future of the school.</li> <li>• Jon Ritchie addressed the significance of deficits on the Authority budget. When a school is to close or academise with a deficit balance that balance is expected to lie with the Local Authority, although the Authority continues to lobby the DfE for additional funding. In recent discussions, the DfE suggested that the deficit could fall on the DSG, via the route of Schools in Financial Difficulties. Given the scale of the deficit, the Authority told the DfE this would not apply in this situation, which they accepted. Therefore, unless further support is given by the DfE, it is assumed that the deficit will fall on the payers of Council Tax in North Tyneside.</li> <li>• JR further noted that the situation highlights the importance of deficit discussions and licenced deficit agreements. It is a balance between allowing schools the opportunity to try and get out of deficit in a 3-year period. However, if the deficit looks like it will not recover there will be a point in time when the route of closure may have to be undertaken.<br/>JR stressed this is not a position anyone wanted to be in and acknowledged the importance of a responsible financial</li> </ul> |  |

|            |  |  |
|------------|--|--|
|            | <p>stability plan and the impacts involved on the Authority's overall finances.</p> <ul style="list-style-type: none"> <li>• JF highlighted the support for pupils in terms of their education and around their anxieties and noted this is a key factor for the Authority, along with the support for the staff and leadership team throughout the process.</li> <li>• The Chair offered support on behalf of Schools Forum members and Headteachers in any way necessary and reiterated the point that systems and processes are in place, to try to mitigate the risk of growing deficits in the budgets set by schools</li> </ul> <p><b>Schools Forum Sub-Finance Group</b></p> <ul style="list-style-type: none"> <li>• CP reminded Forum of the Schools Forum Sub-Finance Group and outlined that membership is voluntary. If anyone is interested in joining the Group, they can contact JC, AB and/or CP for further information.</li> <li>• Current membership is as follows: <ul style="list-style-type: none"> <li>○ Stephen Baines</li> <li>○ David Watson</li> <li>○ Phillip Sanderson</li> <li>○ Steve Wilson</li> <li>○ John Newport</li> <li>○ Gavin Storey</li> <li>○ Laura Baggett</li> <li>○ John Ord</li> <li>○ Colleen Ward</li> <li>○ Matt Snape</li> <li>○ Kelly Holbrook</li> </ul> </li> <li>• The Chair noted that membership currently appears to be weighted towards Middle/Secondary and strongly encouraged Primary colleagues to consider joining the Group.</li> </ul> |  |
| <b>10.</b> | <b>Date and Time of Next Meeting</b>   |  |
|            | Wednesday 13 November 2024 at 12:30pm via Microsoft Teams  |  |

## Item 5a

|              |                  |                              |   |             |   |              |   |          |   |
|--------------|------------------|------------------------------|---|-------------|---|--------------|---|----------|---|
| <b>To:</b>   | Schools Forum    | <b>Author:</b>               | Jon Ritchie, Director of Resources  |             |   |              |   |          |   |
| <b>Date:</b> | 13 November 2024 | <b>Purpose of the Paper:</b> | <table border="1"><tr><td>Information</td><td>✓</td></tr><tr><td>Consultation</td><td>✓</td></tr><tr><td>Decision</td><td>✓</td></tr></table> | Information | ✓ | Consultation | ✓ | Decision | ✓ |
| Information  | ✓                |                              |   |             |   |              |   |          |   |
| Consultation | ✓                |                              |   |             |   |              |   |          |   |
| Decision     | ✓                |                              |   |             |   |              |   |          |   |

**Title of Briefing:** Update all schools on the funding distribution for 2025/26 and general update on school financial positions for 2024/25

### 1. Purpose of Paper:

- 1.1. This paper provides an update on the current information available relating to 2025/26 for each funding block of the Dedicated Schools Grant (DSG).
- 1.2. This report also contains an update on 2024/25 allocations of Schools in Financial Difficulty funding and outlines the progress against the 2024/25 budget monitoring timetable after the first set of monitoring visits to schools.

### 2. Update on 2025/26 Funding Allocations

- 2.1. In line with the Department for Education's (DfE) National Funding Formula (NFF) for the schools' block, in 2025/26 the Dedicated Schools Grant (DSG) will continue to be comprised of four blocks covering: Schools, High Needs, Early Years and the Central School Services. Each of the four blocks has their own funding formula.
- 2.2. The Authority receives its Dedicated Schools Grant funding based on the DfE's National Funding Formula (NFF). In July 2024 the DfE published an announcement to confirm that indicative funding allocations would be delayed for 2025/26 due to the timing of the general election. They explained that they would aim to publish notional funding allocations as soon as possible after the budget announcement on 30 October 2024.

- 2.3 Previously information has been provided in July for planning purposes allowing each local authority to model what indicative funding allocations would look like. For 2025/26 there will be no modelling tool provided although it is still anticipated that the final DSG allocation to the Authority for 2025/26 will be published in December 2024 using the October 2024 census results. The Education and Skills Funding Agency (ESFA) has confirmed that there will be no substantial changes to the National Funding Formula for 2025/26.
- 2.4 As part of the process to move to the National Funding Formula, the DfE initially indicated a two-year transition period (2018/19 and 2019/20) where local authorities could continue to set a local formula to distribute funding to individual schools. These transitional arrangements have again been extended and will continue into 2025/26.
- 2.5 At a national level, as part of the 30 October budget, the Government announced an additional £2.3bn for mainstream schools and young people with high needs for 2025/26 compared to 2024/25. This means that overall core school funding will total almost £63.9bn after accounting for technical adjustments. The Department is now in the process of calculating the schools and high needs national funding formulae (NFF) for 2025–26, to inform local authorities and schools of the funding they can expect to receive in 2025–26. They expect to publish the NFFs by the end of November and will provide more information regarding the NFF for 2025–26, if possible, in advance of that.
- 2.6 Schools Forum may also be aware of the increase in employers' National Insurance Contributions. The Government have said that public sector employers will be compensated for the increase in their NICs contributions, and work is underway to agree how much the DfE will receive as a result. That compensation will be additional to the £2.3bn increase announced; due to timing constraints, it will need to be provided as a separate grant, alongside the NFF, in 2025–26
- 2.7 It is assumed that two restrictions will continue in 2025/26 that:
- Local authorities will continue to set a Minimum Funding Guarantee in the local formula, which for 2024/25 was between +0.0% and +0.5%.



This allows authorities to mirror the real terms protection in the NFF, which is the Government’s expectation; and

- Local authorities can only transfer up to 0.5% of their Schools block to other blocks of the DSG, with their schools’ forum approval. To transfer more than this, or any amount without their schools’ forum approval, they will have to make a disapplication request to the Department for Education, even if the same amount was agreed in the past two years.

2.8 The North Tyneside allocation for the Schools block, Central Schools Services block and High Needs block for 2024/25 is shown below with previous year’s figures.

**Table 1: 2024/25 allocation compared with prior year actuals**

|                         | 2021/22        | 2022/23        | 2023/24        | 2024/25*       | 2025/26 Indicative |
|-------------------------|----------------|----------------|----------------|----------------|--------------------|
|                         | £m             | £m             | £m             | £m             | £m                 |
| Schools                 | 137.231        | 140.373        | 147.654**      | 157.669**      | tbc                |
| Central School Services | 1.877          | 1.724          | 1.621          | 1.563          | tbc                |
| High Needs              | 26.709         | 30.092         | 32.898*        | 34.288         | tbc                |
| Early Years Block       | 13.946         | 14.673         | 14.956*        | 24.478         | tbc                |
| <b>TOTAL</b>            | <b>179.763</b> | <b>186.862</b> | <b>197.129</b> | <b>217.998</b> |                    |
| Change per Year £m      | 15.828         | 7.099          | 10.267*        | 20.869         | tbc                |
| Change per Year %       | 9.66%          | 3.95%          | 5.49%*         | 10.59%         | tbc                |
| PUF                     | £4,425         | £4,539         | £4,771         | £5,039         | tbc                |
| SUF                     | £5,841         | £5,988         | £6,277         | £6,604         | tbc                |
| MPPF: Primary           | £4,180         | £4,265         | £4,405         | £4,610         | tbc                |
| MPPF: Secondary         | £5,415         | £5,525         | £5,715         | £5,995         | tbc                |

\* Updated to reflect July 2024 DFE notification

\*\* Includes Schools Supplementary Grant (SSG) rolled in 2023/24 and Mainstream Schools Additional Grant (MSAG) rolled in 2024/25 (previously separate to DSG)

2.9 Key changes to Early Years Funding:

In the Government’s 2023 Spring budget the Chancellor announced fundamental changes to expand the free childcare offer so that eligible working parents in England were able to access 30 hours of free childcare per week for 38 weeks per year from the term after their child turns 9 months to when they start school.

- From April 2024, working parents of 2-year-olds are now eligible to access 15 hours of free childcare per week (38 weeks a year),
- From September 2024 this has been extended to parents of 9 month to 3-year-olds, and
- From September 2025 working parents of 9 month to 3-year-olds will be able to access 30 free hours per week (38 weeks a year).

2.10 The DFE have also not yet published the expected value of the Early Years or Central Schools Services Block (CSSB) funding for 2025/26. As soon as indicative funding allocations are received the Local Authority will begin modelling potential new rates for Early Years for 2025/26 which will be discussed with Early Years subgroup as soon as possible.

2.11 2025/26 CSSB funding will be reported back to Forum in January 2025 to ratify any changes or reductions and to agree any services, including additional functions, to be funded by de-delegation

### **3 2024/25 Budget Monitoring for Schools**

3.1 As previously reported, the overall level of school balances at the end of March 2024 was £2.930m deficit compared to £0.382m deficit as at March 2023. This represented a decrease in balances of £2.548m.

3.2 Schools are in the process of completing the first set of monitoring for 2024/25 which is going well despite the additional challenge for schools and officers of an IT upgrade, implemented by the providers of the schools budgeting system.

### **4. 2024/25 Schools in Financial Difficulty Funding**

4.1. The opening balance for de-delegated funds for Schools in Financial Difficulty (SiFD) funding in 2024/25 was £0.422m. This is the balance available to fund applications submitted by schools and considered by Schools Forum Finance Sub-Group. The sub-group met on 30 September 2024 to discuss SiFD funding and school representatives presented applications.

4.2. The Discussions led to agreement that the criteria for SiFD funding should be more robust and the sub-group recommend that Schools Forum approve the following criteria:

- A school must come back into an in-year balance within their 3-year budget recovery plan.
- A school must have ended the previous year in deficit before any applications are considered.
- Funding will be allocated based on a school's outturn position, not budget monitor projections.
- Schools are required to remain within their deficit recovery plan to be eligible.

4.3. Based on the above criteria some school applications will now be deferred to 2025/26 so that the 2024/25 outturn position can be considered, including any improvements throughout the year. The sub-group feel this would make the allocations more prudent, based on actual balances rather than budget projections.

4.4. The sub-group recommend that School's Forum approve 2024/25 funding of £0.185m to 3 schools based on outturn balances from 2023/24, as outlined in table 2.

**Table 2: Finance Sub-Group Recommendations for SiFD Funding**

| School                          | 2024/25 SiFD Funding |
|---------------------------------|----------------------|
| Longbenton High School          | £80,000              |
| Norham High School              | £80,000              |
| St Bartholomew's Primary School | £25,000              |
| <b>TOTAL</b>                    | <b>£185,000</b>      |

4.5. It is recommended that Norham & Longbenton will both be allocated £0.080m as a contribution towards their deficit and in recognition that both schools are on the right trajectory and their financial position is improving.

## 5. High Needs Block Update for 2024/25

5.1. Schools Forum will recall, the High Needs block outturn in 2023/24 was a pressure of £10.494m which included Safety Valve funding of £9.750m

received up to 31 March 2024. The Authority submitted the first report to the DfE for 2024/25 on progress against the DSG Management Plan on 28 August 2024. Despite the delayed savings for 2024/25 the Authority is still on track to reach a positive in year balance on its DSG High Needs Block by the year end 2027/28. The next reporting deadline is 27 November 2024.

## **6. Early Years Block Update for 2024/25**

6.1. Schools Forum will recall, the Early Years block outturn for 2023/24 was a surplus of £1.046m. The 2023/24 surplus balance after final clawback is £0.859m, of which £0.665m is estimated as required to fund the additional week in the 2024/25 local payment schedule. The 2024/25 projection is a break-even in-year position across the Early Years Entitlements, there is no indication of any potential funding shortfall.

6.2 Following confirmation of the September 2024 teachers pay award, the DfE announced additional funding to increase the hourly funding rates for early years providers to deliver the existing early years entitlements. For 2024 to 2025 this funding will be known as the Early Years Budget Grant (EYBG). This is a new funding stream with effect from September 2024.

## **7. Recommendations:**

7.1 Having read this report and clearly understanding the information provided, Schools Forum is asked to:

1. Note the delay in indicative allocations for each of the four Dedicated Schools Grant funding blocks;
2. Note the positions on High Needs, Early Years Block funding;
3. Note the budget monitoring progress for schools;
4. Agree the Schools Forum Subgroup recommendation for allocation of Schools in Financial Difficulty funding.

7.2. Members are reminded of who is eligible to vote and the voting table is noted at Appendix A for Reference.

## Appendix A – Voting Table

| North Tyneside Schools Forum Member Roles & Voting |                         |                              |                                 |                |                 |                   |                  | <i>last updated September 2019</i> |  |  |
|--|-------------------------|------------------------------|---------------------------------|----------------|-----------------|-------------------|------------------|------------------------------------|--|--|
| de-delegation Primary                              | de-delegation Secondary | scheme for financing schools | consultation on funding formula | General Duties | Retained Duties | all other matters |                  |                                    |  |  |
| 1  | 2                       | 3                            | 4                               | 5              | 6               | 7                 |                  |                                    |  |  |
| <b>Voting</b>                                      |                         |                              |                                 |                |                 |                   | <b>Phase</b>     | <b>Role</b>                        |  |  |
| <b>School Members</b>                              |                         |                              |                                 |                |                 |                   |                  |                                    |  |  |
| x  |                         | x                            | x                               | x              | x               | x                 | First            | Head                               |  |  |
| x  |                         | x                            | x                               | x              | x               | x                 | Primary          | Head                               |  |  |
|  | x                       | x                            | x                               | x              | x               | x                 | High             | Head                               |  |  |
|  | x                       | x                            | x                               | x              | x               | x                 | Middle           | Head                               |  |  |
|  | x                       | x                            | x                               | x              | x               | x                 | Secondary        | Head                               |  |  |
| <b>Other School Members Non Locality Based</b>     |                         |                              |                                 |                |                 |                   |                  |                                    |  |  |
| x  |                         | x                            | x                               | x              | x               | x                 | Primary/ First   | Governor                           |  |  |
|  | x                       | x                            | x                               | x              | x               | x                 | Secondary/Middle | Governor                           |  |  |
|  |                         | x                            | x                               | x              | x               | x                 | Nursery          | Head                               |  |  |
|  |                         | x                            | x                               | x              | x               | x                 | PRU              | Head                               |  |  |
|  |                         | x                            | x                               | x              | x               | x                 | Special          | Head                               |  |  |
|  |                         |                              | x                               |                | x               | x                 | Academy          | Other                              |  |  |
| <b>Non Schools Members Non Locality Based</b>      |                         |                              |                                 |                |                 |                   |                  |                                    |  |  |
|  |                         | x                            | x                               |                |                 | x                 | 16-19 Providers  | Other                              |  |  |
|  |                         |                              | x                               |                |                 | x                 | EY PVI           | Other                              |  |  |
|  |                         |                              |                                 |                |                 | x                 | C of E Diocese   | Other                              |  |  |
|  |                         |                              |                                 |                |                 | x                 | RC Diocese       | Other                              |  |  |
|  |                         |                              |                                 |                |                 | x                 | Trades Union     | Other                              |  |  |

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## Item 5b

|              |                  |                              |   |             |   |              |   |          |   |
|--------------|------------------|------------------------------|---|-------------|---|--------------|---|----------|---|
| <b>To:</b>   | Schools Forum    | <b>Author:</b>               | Jon Ritchie, Director of Resources  |             |   |              |   |          |   |
| <b>Date:</b> | 13 November 2024 | <b>Purpose of the Paper:</b> | <table border="1"><tr><td>Information</td><td>✓</td></tr><tr><td>Consultation</td><td>✓</td></tr><tr><td>Decision</td><td>✓</td></tr></table> | Information | ✓ | Consultation | ✓ | Decision | ✓ |
| Information  | ✓                |                              |   |             |   |              |   |          |   |
| Consultation | ✓                |                              |   |             |   |              |   |          |   |
| Decision     | ✓                |                              |   |             |   |              |   |          |   |

**Title of Briefing:** Update on National Funding Formula and the Outcome of Consultation with All Schools on Funding Distribution for 2025/26

### 1. Purpose of Paper

1.1 This paper provides a summary of the outcomes from the consultation exercise carried out with all mainstream schools during October 2024 in relation to the Schools Block and Local Funding Formula (LFF) in North Tyneside.

### 2. Consultation Responses for Local Funding Formula Changes

2.1 Officers from the Authority have been working to review the Authority's Local Funding Formula (LFF) for schools and what the potential impact would be for the LFF to remain aligned to the National Funding Formula (NFF). However due to the delay in receiving indicative funding allocations from the Department for Education (DfE) this has been based on 2024/25 funding and general funding principles going forward.

2.2 The Authority is now in the 2<sup>nd</sup> year of the Department for Education's (DfE) 'safety valve' intervention programme, which aims to deliver a package of reform to the Authority's high needs system that will bring the High Needs Block overspend under control and generate £19.5m additional funding over the life of the programme, to remove the Authority's historic High Needs block deficit.

- 2.3 The Authority worked with partners across Special Educational Needs and Disabilities (SEND) to co-create the DSG Management Plan, which includes an assumed 0.5% block transfer from Schools block to High Needs block, in each year of the plan.
- 2.4 Regular updates have been presented and discussed with Schools Forum and Schools Forum Finance sub-group and the 2025/26 Local Funding Formula consultation aimed to gather the views of individual schools and to enable Schools Forum to reach agreement on the funding formula options. These were: -
- To continue to use factors in line with NFF, funding permitting;
  - To allow the Authority to set a Minimum Funding Guarantee (MFG) and capping based on affordability;
  - To revise allocations set aside for growth funding and falling rolls funding
  - To support a 0.5% transfer from the Schools block to High Needs block
  - To identify a 0.5% transfer allocation which impacted on all schools by adjusting the level of protection in the funding formula
- 2.5 Relevant information was presented to schools at 3 separate briefings with an introduction on the wider funding formula and a focus on the main changes which schools are being asked to consider. Unfortunately, we were not able to outline the main changes across all blocks of the DSG as would normally be the case, because there has not been any indicative funding allocations issued yet for 2025/26 by the DfE. The consultation exercise was launched for schools to complete between 7 October and 27 October 2024, with each school given the opportunity to submit a single response.
- 2.6 In total 28 surveys were completed out of a total possible 71, The response rate moved from 55% in 2023 to 39% in 2024. The responses were, split by phase as follows:

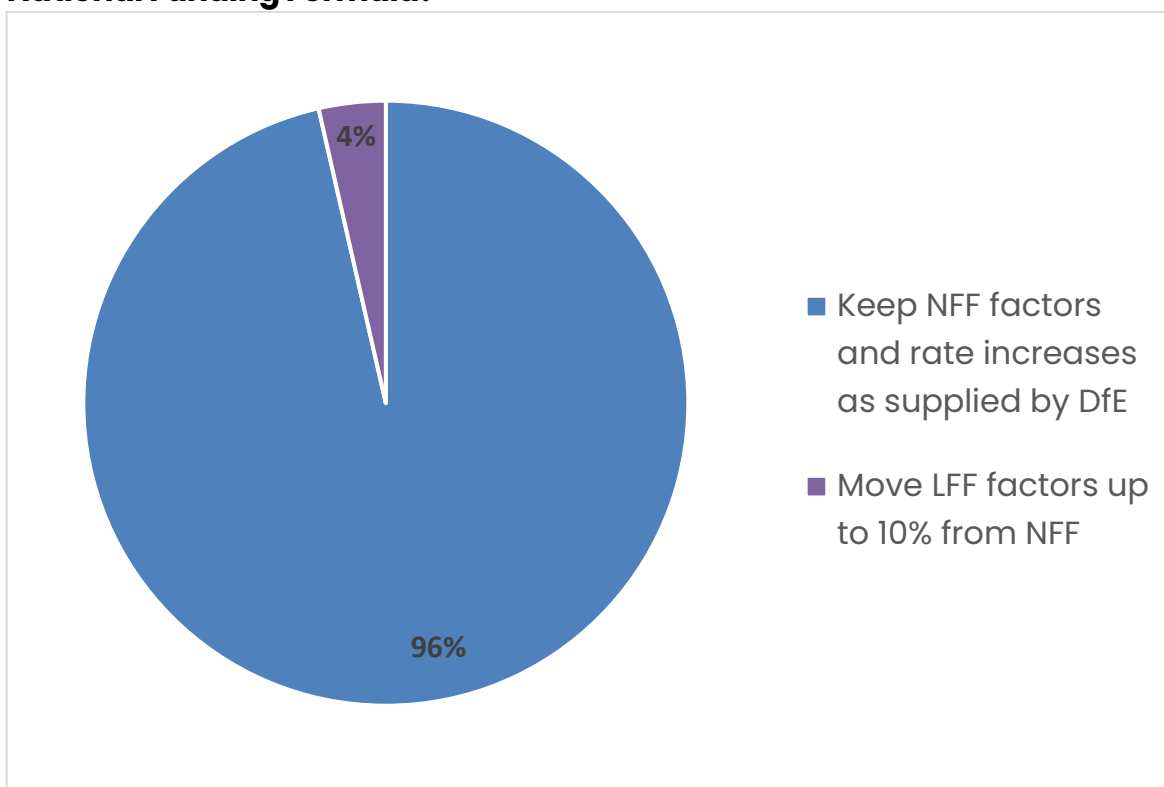


## 2.7 Table 1: Response Rates to the Consultation by Phase

| Phase        | Number Schools Responded | Number in Phase | Response Rate |
|--------------|--------------------------|-----------------|---------------|
| Primary      | 13                       | 45              | 29%           |
| Secondary    | 9                        | 13              | 69%           |
| Academies    | 6                        | 13              | 46%           |
| <b>Total</b> | <b>28</b>                | <b>71</b>       | <b>39%</b>    |

2.8 Responses to the consultation questions are summarised below.

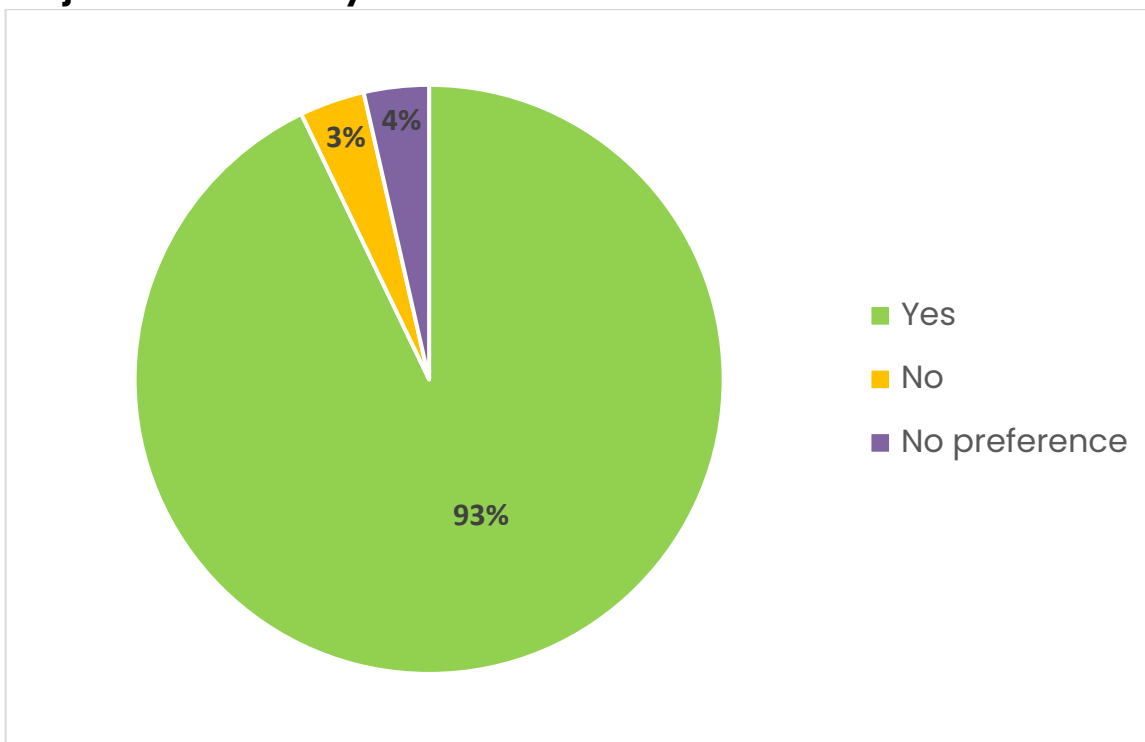
**Question - Do you agree that, within the funding allocation, North Tyneside should set it's Local Funding Formula (LFF) factors in line with National Funding Formula?**



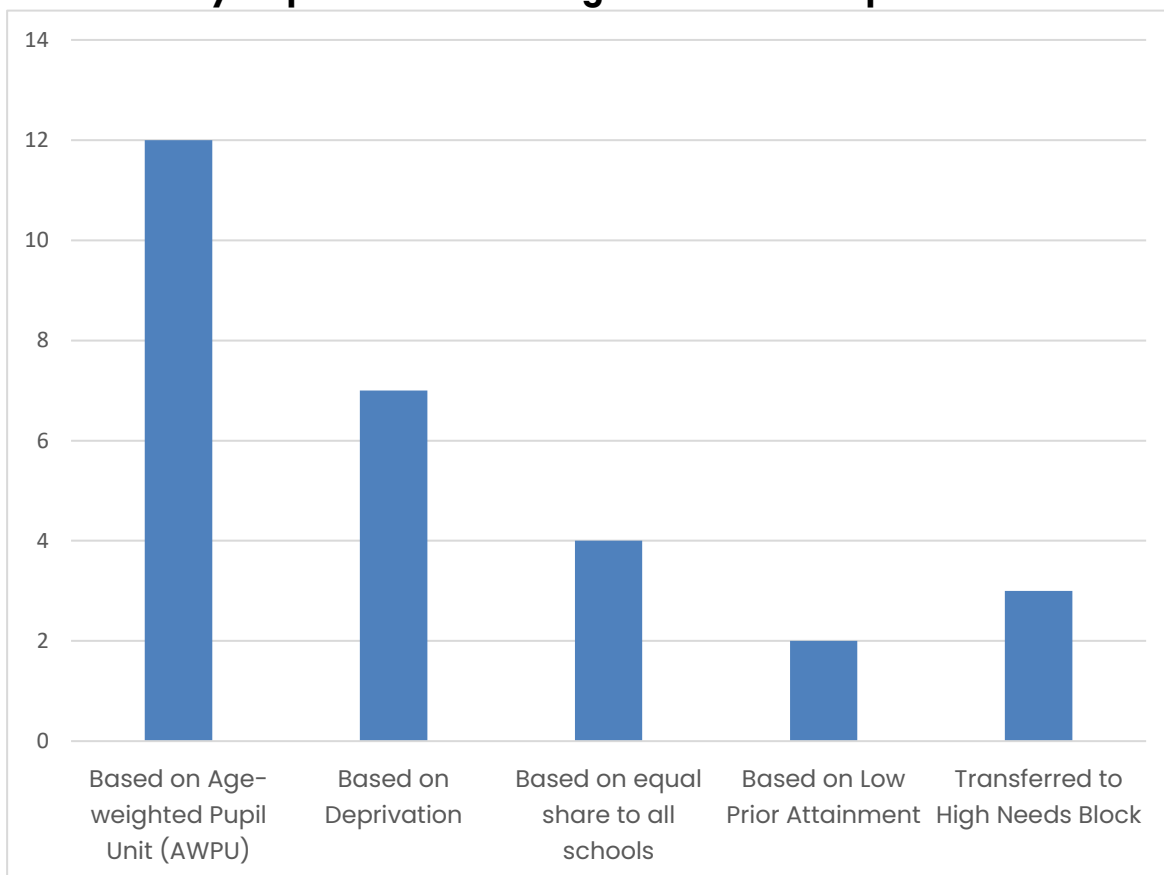
2.9 The consultation favours staying on NFF factors, funding permitting. 96%, 27 schools agreed with the continuation, with only 4%, 1 school disagreeing.

2.10 Schools were asked if they supported the Authority setting Minimum Funding Guarantee (MFG) levels based on affordability. 93%, 26 schools agreed that the Authority should continue to set the MFG.

**2.11 Question – Do you agree to allow the Authority to set the level of MFG subject to affordability?**



**2.12 Question – Which of these factors do you think should be used to distribute any surplus after delivering the chosen MFG protection level?**



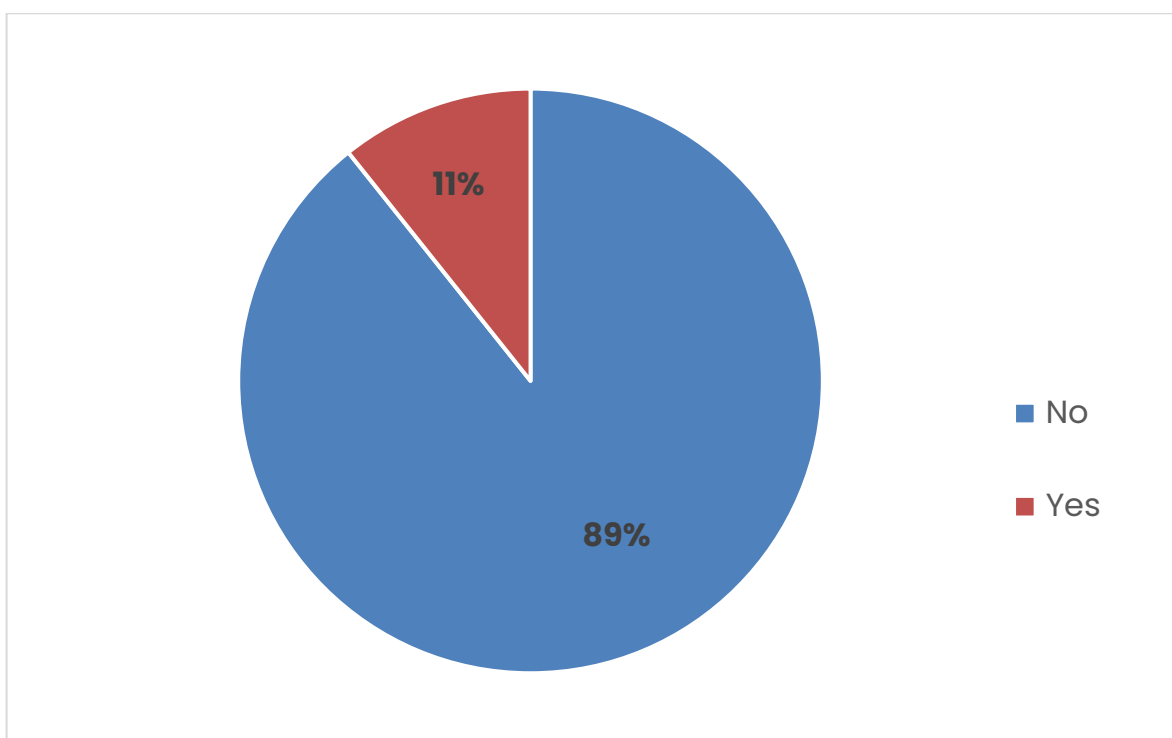
- 2.13 In reviewing how best to allocate any surplus funding for 2025/26, the preferred option has changed to basing it on basic entitlement, Age Weighted Pupil Unit (AWPU). For 2024/25 the preferred option was to base it on deprivation however, for 2024/25 there was no surplus.
- 2.14 As part of the funding formula, the Education and Skills Funding Agency (ESFA) calculates the expected requirements for growth funding in North Tyneside maintained schools. Based on the NFF the growth allocated to the Authority for 2024/25 was £0.751m. However, historically Schools Forum have set aside £0.250m.
- 2.15 Similarly the ESFA also calculates the expected requirements for falling rolls funding in North Tyneside maintained schools and for 2024/25 this was £0.140m. Historically again, Schools Forum have set aside £0.250m.
- 2.16 The average allocations for growth and falling rolls over the past 4 years, 2021/22 to 2024/25 were £0.237m for growth and £0.110m for falling rolls. If the average was adjusted for 2023/24, as allocations were exceptionally high in that year, the averages drop to £0.172m for growth and £0.090 for falling rolls. After discussions with Schools Forum Finance Sub-group, one option offered to schools was to reduce allocations based on historic averages, to £0.200m for growth and £0.100m for falling rolls.
- 2.17 It is important to note that any qualifying schools would still receive the relevant funding, as any surplus or deficit would be carried forward into the next financial year. Schools were asked for their views as to whether Schools Forum should:
- continue to allocate £0.250m to growth and falling rolls funding
  - set the allocation at the NFF value or
  - reduce allocations based on historic averages.
- 2.18 From table 2 below, we can conclude that the majority of schools favour the proposal to reduce both funding allocations, for growth and falling rolls, which would subsequently decrease the impact of any 0.5% transfer by £0.200m if agreed.

2.19 **Table 2: Which options do you support for the suggested allocations for Growth and Falling Rolls Funding**

|   | <b>Growth Funding</b> | <b>Falling Rolls Funding</b> |
|---|-----------------------|------------------------------|
| Agree to Keep funding at £0.250m  | 7%                    | 29%                          |
| Agree to Increase to NFF Calculated Value (Growth £0.751m, Falling Rolls £0.140m) | 0%                    | 0%                           |
| Reduce funding based on historic averages (Growth £0.200m, Falling Rolls £0.100m) | 93%                   | 71%                          |

2.20 There was no overall agreement to transfer 0.50% of the Schools block to High Needs block, with 11% of schools agreeing with the transfer (compared to 28% last year). The remaining 89% of schools cited one main reason for not agreeing to the transfer which was the impact that deducting this funding has on the unprecedented financial uncertainty schools are already facing.

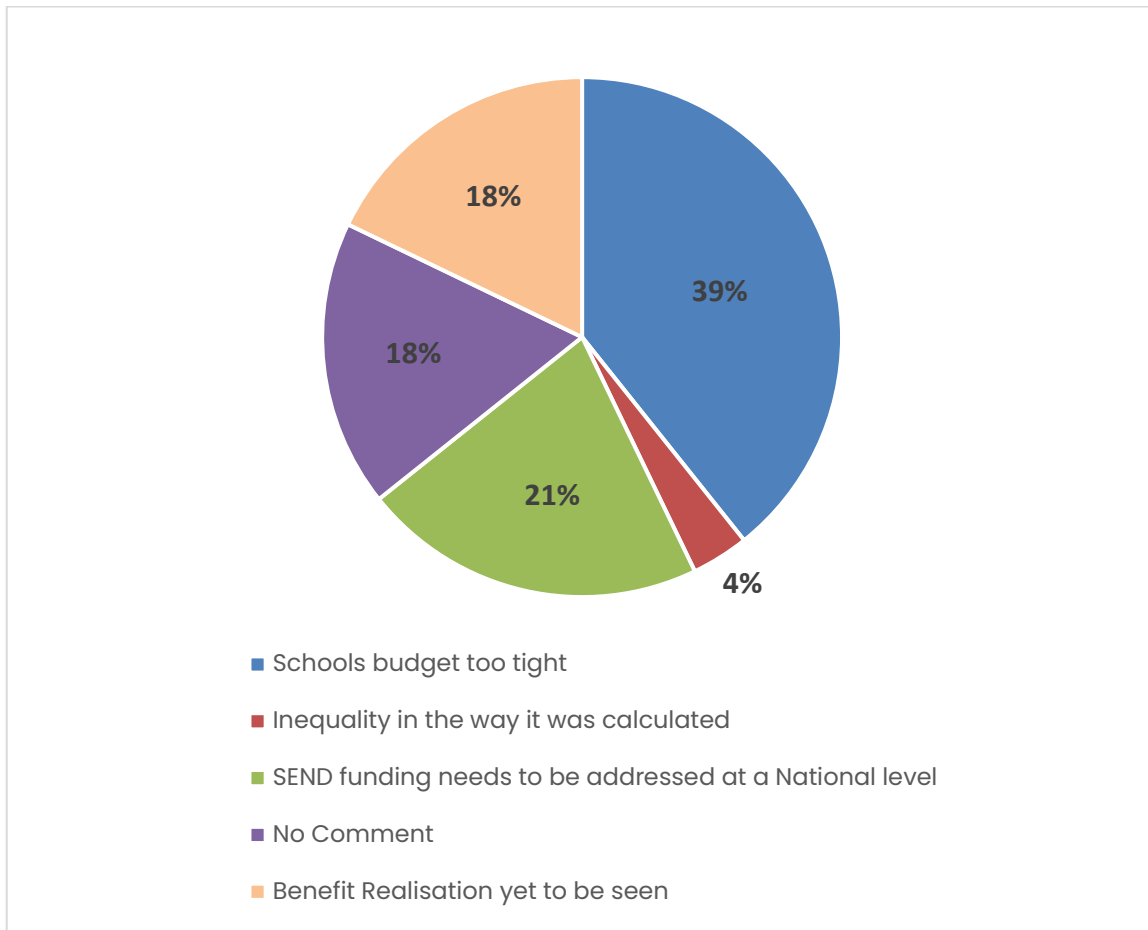
2.21 **Question – Are you supportive of a transfer of 0.5% from the Schools Block to the High Needs Block, to meet the needs of children and young people in our North Tyneside SEND system.**



2.22 Of the schools who didn't support the transfer, 39% stated their main concern was the impact on school finances when already facing significant other pressures. 21% have concerns over how Special Education Needs and Disabilities (SEND) are funded and thought this should be addressed by Government rather than by transferring funding from mainstream schools.

2.23 There were also concerns raised about the inequality of how the transfer could potentially be calculated between schools. Benefits realisation was another significant factor in schools not supporting the transfer 18% felt they need to see more results from the DSG Management Plan.

**2.24 Question – Additional comments on responses to whether to transfer 0.5% from Schools Block to High Needs Block**

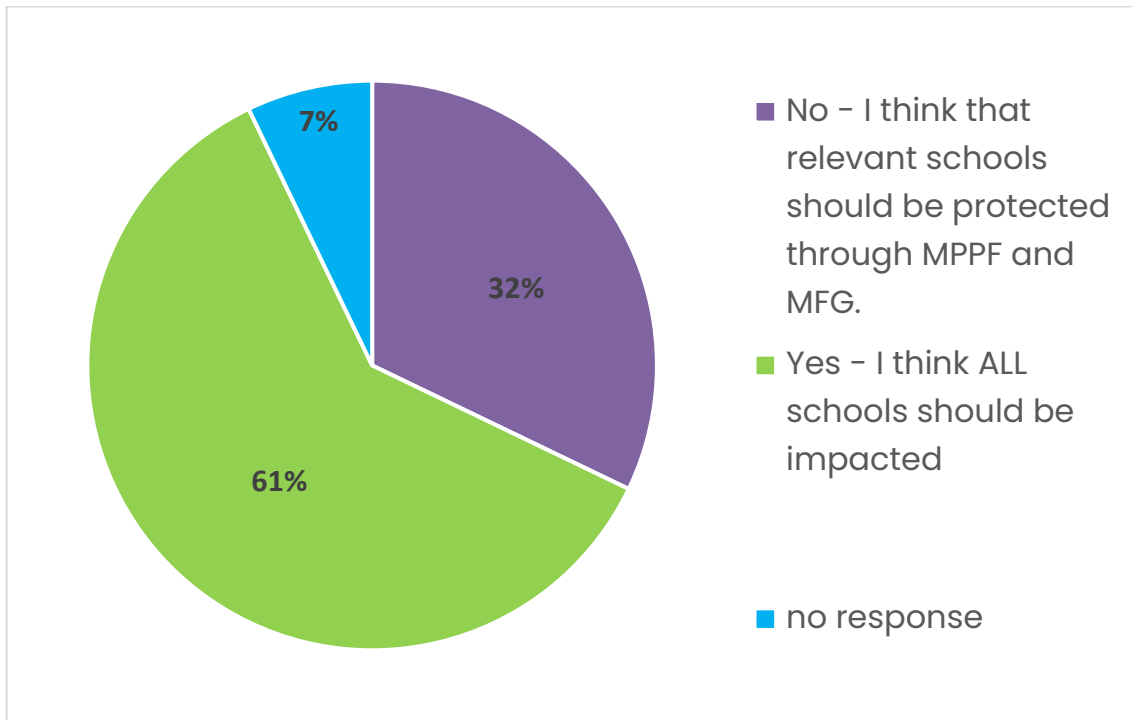


2.25 In 2024/25 there were **22** schools which were not impacted by the 0.5% transfer due to Minimum Per Pupil Funding (MPPF) and Minimum Funding Guarantee (MFG). This meant that the range of school contributions went

from 0% (those protected) to 0.86% (higher percentage to compensate for protected schools).

2.26 Schools were asked for their view on slightly adjusting Minimum Per Pupil Funding (MPPF) and Minimum Funding Guarantee (MFG) so that the 0.5% transfer would impact **all** schools. This followed feedback from School Forum Finance sub-group to ensure parity across all phases of schools. In the consultation 61% of schools who responded felt that all schools should be impacted by the transfer.

**2.27 Question - If approved, would you prefer that the 0.5% transfer impacted on all schools?**



2.28 Schools Forum need to be aware that any decision to adjust the MPPF would also need approval by the Department for Education (DfE) via a disapplication request. If Schools Forum do not agree to the 0.5% transfer the Local Authority will be required to submit a disapplication request to the DfE to request the transfer, in line with the DSG Management plan and advice from the ESFA. The deadline for submitting any disapplication requests for 2025/26 is 18 November 2024.

### **3. Recommendations**

3.1. Having read this report and clearly understanding the information provided, Schools Forum is asked to consider the results of the consultation with schools; and vote on the following options:

1. Agree to continue to use factors in line with NFF, funding permitting.
2. Agree to allow the Authority to set a Minimum Funding Guarantee (MFG) and capping based on affordability.
3. Agree that AWPU factors be used to distribute any surplus after delivering MFG
4. Agree that Growth and Falling Rolls funding should each be set based on historic averages – Growth £0.200m, Falling Rolls £0.100m.
5. Consider the response to the request to transfer 0.50% School block funding to High Needs and either:
  - a) Support a 0.50% transfer from Schools block to High Needs block to support the DSG Management plan; or
  - b) Not support any transfer of funds from Schools block to High Needs block.
6. Agree that if a 0.50% transfer is approved that the allocation should impact on all schools by adjusting the MFG and MPPF.

3.2. Members are reminded of who is eligible to vote and the voting table is noted at Appendix A for Reference.

## Appendix A – Voting Table

| North Tyneside Schools Forum Member Roles & Voting |                         |                              |                                 |                |                 |                   |                  | <i>last updated September 2019</i> |  |
|--|-------------------------|------------------------------|---------------------------------|----------------|-----------------|-------------------|------------------|------------------------------------|--|
| de-delegation Primary                              | de-delegation Secondary | scheme for financing schools | consultation on funding formula | General Duties | Retained Duties | all other matters |                  |                                    |  |
| 1  | 2                       | 3                            | 4                               | 5              | 6               | 7                 |                  |                                    |  |
| <b>Voting</b>                                      |                         |                              |                                 |                |                 |                   | <b>Phase</b>     | <b>Role</b>                        |  |
| <b>School Members</b>                              |                         |                              |                                 |                |                 |                   |                  |                                    |  |
| x  |                         | x                            | x                               | x              | x               | x                 | First            | Head                               |  |
| x  |                         | x                            | x                               | x              | x               | x                 | Primary          | Head                               |  |
|  | x                       | x                            | x                               | x              | x               | x                 | High             | Head                               |  |
|  | x                       | x                            | x                               | x              | x               | x                 | Middle           | Head                               |  |
|  | x                       | x                            | x                               | x              | x               | x                 | Secondary        | Head                               |  |
| <b>Other School Members Non Locality Based</b>     |                         |                              |                                 |                |                 |                   |                  |                                    |  |
| x  |                         | x                            | x                               | x              | x               | x                 | Primary/ First   | Governor                           |  |
|  | x                       | x                            | x                               | x              | x               | x                 | Secondary/Middle | Governor                           |  |
|  |                         | x                            | x                               | x              | x               | x                 | Nursery          | Head                               |  |
|  |                         | x                            | x                               | x              | x               | x                 | PRU              | Head                               |  |
|  |                         | x                            | x                               | x              | x               | x                 | Special          | Head                               |  |
|  |                         |                              | x                               |                | x               | x                 | Academy          | Other                              |  |
| <b>Non Schools Members Non Locality Based</b>      |                         |                              |                                 |                |                 |                   |                  |                                    |  |
|  |                         | x                            | x                               |                |                 | x                 | 16-19 Providers  | Other                              |  |
|  |                         |                              | x                               |                |                 | x                 | EY PVI           | Other                              |  |
|  |                         |                              |                                 |                |                 | x                 | C of E Diocese   | Other                              |  |
|  |                         |                              |                                 |                |                 | x                 | RC Diocese       | Other                              |  |
|  |                         |                              |                                 |                |                 | x                 | Trades Union     | Other                              |  |