

Meeting: North Tyneside Schools Forum **Date:** Wednesday 12 November 2025
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/B75SXmYgVv8>

Agenda

Ref.	Item	Lead
1	Welcome and Apologies	Chair (5 mins)
2	Attendance Register / Membership <i>Verbal Update</i>	CP (5 mins)
3	Minutes of the last meeting and Matters Arising <i>Circulated</i>	Chair (15 mins)
4	Declarations of Interest	Chair (5 Mins)
5	Schools Finance Update <i>Circulated</i>	JC/AB (30 mins)
6	National Funding Formula and Outcome of Consultation	JC/AB (20 mins)
7	Safety Valve Update <i>Verbal Update</i>	MM (20 mins)
8	Annual Review of Schools Forum Constitution <i>Verbal Update</i>	CP (15 mins)
9	Any Other Business	All
	Date and Time of Next Meeting: 21 January 2026 @ 12.30pm	

North Tyneside Schools Forum Member Roles & Voting								
de-delegation Primary	de-delegation Secondary	scheme for financing schools	consultation on funding formula	General Duties	Retained Duties	all other matters	<i>last updated September 2019</i>	
1	2	3	4	5	6	7		
Voting							Phase	Role
School Members								
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
Other School Members Non Locality Based								
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
Non Schools Members Non Locality Based								
		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

Timetable & Forward Plan 2025/26

Date	Activity	Responsible
24 September 2025	<u>Schools Forum Meeting</u> 1. Schools Finance Update 2. Reports from Services for 26/27 Financial Year Proposal (if required)	Schools Forum
2 October 2025	School Census Day	DFE/ESFA
29 October 2025	Schools Census database closed. Checks and Validation commences.	
12 November 2025	<u>Schools Forum Meeting</u> 1. Schools Finance Update 2. National Funding Formula and Outcome of Consultation 3. Safety Valve Update 4. Annual Review of Schools Forum Constitution	Schools Forum
21 January 2026	<u>Schools Forum Meeting</u> 1. Local Authority Finance Update 2. Schools Finance Update 3. Scheme for Financing Schools Update (if applicable) 4. Safety Valve Update 5. Consideration of Special Leave for 25/26 Financial Year	Schools Forum
January 2026	Deadline for submissions of final 2026 to 2027 APT to ESFA	Local Authority
2 February 2026	Cabinet Meeting for approval of 26/27 Schools Funding	Local Authority
16 February 2026	Cabinet Meeting	Local Authority
28 February 2026	Deadline for confirmation of Schools budget shares to mainstream maintained schools.	DFE/ESFA
18 March 2026	<u>Schools Forum Meeting</u> 1. Schools Finance Update 2. Schools In Financial Difficulty	Schools Forum
16 March 2026	Cabinet Meeting	Local Authority
8 July 2026	<u>Schools Forum Meeting</u> 1. Schools Finance Update 2. Reports from Services for 26/27 Financial Year Proposal 3. Safety Valve Update	Schools Forum

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Item 3

Meeting Schools Forum **Date** 24 September 2025

Location Via Microsoft Teams

✓ Present
D Deputy
A Apologies
O Absent

Present

Name	Organisation	Representing	24.09.2025
Angi Gibson	Hadrian Park Primary School	Academy	✓
Anthony Gollings	St Thomas More	RC Diocese	✓
Claire McLeod	Trade Unions	Trade Unions	D (Candy Mellor)
Claire Withers	Fordley Primary School	Primary	✓
Colette Bland	St Mary's RC Primary School (NS)	Academy	✓
Colleen Ward	Coquet Park First School	First (*)	✓
Daniel Jamieson	Burnside Community College	Secondary	A
David Watson	St Thomas More	Academy (*)	✓
Diane Turner	Tyne Coast	16-19 Provider	O
Finn Wilcock	Southridge First School	First	✓
Gavin Storey	Cullercoats Primary School	Primary (*)	✓
Gillian Tawes	Shiremoor Primary School	Governor – Primary	A
Jane Lowe	Monkseaton Middle School	Governor – Secondary	✓
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 (*)	✓
Justina Terretta	Beaconhill Special School	Special	✓
Karen Croskery	North Tyneside Student Support Service	Pupil Referral Unit (PRU)	A
Kelly Holbrook	Longbenton High School	Secondary (*)	✓
Laura Baggett	Monkhouse Primary School	Primary (*)	✓
Lesley Griffin	Wellfield Middle School	Governor – Secondary	✓
Louise Bradford	C of E Diocese	C of E Diocese	✓
Matt Snape	Marden High School	Secondary (*)	✓
Philip Sanderson	Kings Priory	Academy (*)	D (Julie Mogridge)
Steve Wilson	Whitley Bay High School	High (*)	✓
Tim Jones	Spring Gardens	Primary	✓
Wayne Myers	Richardson Dees Primary	Primary	✓
In Attendance:			
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	✓
Mark Mirfin	Assistant Director, Commissioning, Partnerships and Transformation	NTC	A
April Gibbs-Thorn	Statutory Services Officer – Schools Forum	NTC	✓

(* indicates current member of Finance Sub Group)

Minutes of Meeting

Ref	Item	
1.	Welcome and Apologies	
	- The Chair welcomed everyone to the first meeting of the new school year and issued a reminder that the meeting is live streamed to the public on the Authority's YouTube Channel. - A reminder of roles and responsibilities for Forum Members was provided. - See table above for apologies.	
2.	Attendance Register / Membership	Christina Ponting
	Membership: - Christina confirmed there are currently three vacancies. Work is being undertaken with localities to fill two of the vacancies. Also, a vacancy has arisen for a PVI representative, and one nominee has been received to date. - Lesley Griffin has agreed to stand as a Schools' Forum governor, has been elected and will be in pot for the next three years.	
3.	Minutes of the last meeting and Matters Arising	
	Minutes of the last meeting were agreed as an accurate record of the meeting.	

	Matters arising Re the Falling Rolls Funding (previous minutes, page 7). - Recommendations from Finance Sub-Group for options within Falling Rolls Funding would be presented to Forum in the next meeting. Jane Cross confirmed that the recommendations were included in the Finance update report. - Re the Growth Funding Process for Schools, particularly funding for Year 8's to go into Year 9's (previous minutes, page 9). In the previously noted action, Christina Ponting and Senior Officers committed to consideration of practical options and to bring these back to Forum. Christina confirmed that conversations had been held internally. Students moving from Year 8 to Year 9 are not subject to a disapplication request. Jane Cross advised that the subject had been discussed within finance sub-group and separately with Jon Ritchie and Julie Firth. It has been suggested with regard to funding identified for Monkseaton High School for September 2026 (and based on the October 2025 census) that this funding could be ring-fenced and used to fund this area of growth. Jane further noted that figures would not be known until October 2025, however once exact figures are known they will be fed back to Forum. DISCUSSION - Anthony Gollings noted that in the previous minutes there is a reference to a DSG management plan being presented at Forum. Julie Firth confirmed that the DSG is in the termly report that goes to DfE. A delay on the report sign off has resulted in not being able to meet internal governance and so will be presented at the next Schools Forum. - No further questions.	
4.	Declarations of Interest	
	Stephen Wilson noted an interest in relation to Growth Funding as Whitley Bay High School is named.	
5.	Schools Finance Update Jane Cross/Andrew Brown	
	Andrew Brown talked through a presentation on screen, with reference to the accompanying Finance Update report. Main points to note as follows:	

2025/2026 Schools Budgets

- £4.337m year-end deficit for 2024/25.
- Projected year end deficit was £14.918m across all schools.
- Budget Monitoring 1 (BM1) to be completed by the agreed deadline of 31 October 2025.
- All Schools who submitted a deficit budget plan for 2025/26 have been contacted to arrange additional support. Initial deficit clinics were held in July 2025. The remaining sessions will be held throughout September with a Schools Forum Finance Sub-group meeting to consider applications for Schools in Financial Difficulty Funding in the Autumn term.

Schools Business Services / iTrent

Andrew noted the on-going problems with SBS and problems with iTrent system within the Local Authority which has resulted in multiple ledger miscoding.

- There has been a full acknowledgement of difficulties and commitment to ensure full functionality with bi-weekly meetings between Authority & SBS officers.
- Andrew discussed the email issued 11th September. This incorporated two key actions; Schools to contact designated finance officer to schedule BM1 meeting and also to ensure staffing contacts are fully up to date within SBS.

Schools Business Services Contract

Andrew discussed the results of the contract consultation. Results as below:

- 28 schools responded to the consultation survey (49% response).
- There were four options and results identified;
 - 10 schools – 3-year contract
 - 8 schools – 1 year contract
 - 2 schools – Unsure
 - 4 schools – Alternative options
- Andrew highlighted that four schools had responded but they had not selected a preferred option.
- Working with Procurement, and G-Cloud a 1-year contract with 1 year rolling contract at a 50% discount has been secured (G-Cloud 14 1+1).

2025/2026 Deficit Schools

- 26 deficit schools – 2 listed as structural deficits.

	- Deficit clinics required for 21 schools of which 4 clinics will take place in the Autumn term. Schools in financial difficulty bids £0.127m delegated funding available. - Bids will be invited and presentations reviewed at Finance sub-group. Date to be confirmed DISCUSSION - The Chair noted the deadline for BM1 as 31 Oct and asked if there was confidence that BM1 would be ready to be shared with Forum in November. - Andrew agreed that there is confidence, however a caveat to this that occasionally there are 'straggler' schools and in this instance a report will be developed which defaults to their known budget figures. - Andrew noted the amount of work and timescales required and stressed the need for financial information from fully functioning systems. 2025/26 Falling Rolls Jane Cross talked through the presentation slides on screen. Main points to note as follows: 2025/2026 £0.150m - Historic Balances £0.415m - Equates to a total £0.565m - Jane noted the lengthy conversation at Finance sub-group around the impact of Monkseaton High school. The discussions in Finance sub-group were based on the above figures as well as the guidance around falling rolls criteria and included the wider strategic education review. - Because of those conversations, Finance sub-group took the decision to propose the deferment of falling rolls payments to the end of the year. - If Forum in agreement, recommendations would be brought to Forum in March 2026. 2025/26 Growth Funding Jane noted the previous Schools Forum decision that exceptional growth figures will be based on the October 2025 census. Figures as below: £0.151m - available funding. 7 eligible schools - £0.768. - Equates to a funding gap of £0.617m.	
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- Jane reiterated that internal conversations have discussed the use of Monkseaton High School funding from September 2026 and ring fence his to fund the funding gap (full or in part) within Growth funding.
- David Mason reiterated that the Authority is comfortable in principle with this proposal and considered this to be fair from an overall financial perspective.
- Jane noted that exact figures will not be known until the October census, however schools are listed in the Finance update report.

DISCUSSION

- Steve Wilson asked for a point of clarification and asked would growth be cross referenced with the October census figures to make up any shortfall. Jane noted that this has been carried out in the past on school's request. The question to Schools Forum therefore would be should the allocation of funding be done as on current numbers and reviewed in October or wait until the October census.
- Laura Bagget referred to the allocation of Falling Rolls surplus at the end of the financial year. Laura queried what would happen to any unallocated finding within Falling Rolls. Jane noted this would be a School's Forum decision. In the past allocations would be made with refunds to Academies and put remainder in schools in financial difficulty. An additional option could be to roll it forward.
- Matt Snape declared an interest as his schools would be in the running for the growth funding linked to Year 9 pupils. Matt noted numbers now in his school are quite different to those published by the finance department and so would be in favour of the use of the October census figures.
- The Chair summed up some points with regard to Falling Rolls, and the reason why the decision is proposed to be delayed.
 - When Falling Rolls was looked at, in terms of the criteria required for places needed within three years, Finance sub-group wanted to delay until there was more clarity.
 - In relation to 'carrying forward'. The process of reallocating funds to academies then transferring balances into Schools in Financial Difficulty (SIFD) has not been carried out; for no other reason than it just had not taken place. The proposal therefore from the Finance Sub-group was we did not transfer retrospectively, in knowledge that at the end of the year a significant amount of money would be required and could be used to fund this as opposed to entering into a deficit position.
 - Within Growth Funding, the Chair noted the complexity of the situation this year. The Chair stressed he would fully support that decision is made on October census rather than indicative figures. Any growth within different year groups not in agreement with the Local Authority

is not eligible for growth funding. Any growth due to Year 9 Monkseaton High School pupils would be considered for growth funding.

- Jane referred to Falling Rolls funding and commented that if refunds had been allocated and remainder used in SIFD, this would not have detracted from eligibility for falling rolls.
- Jane also noted in terms of Growth funding, if Schools Forum feel there has been a great deal of movement between September admission numbers and what will be reflected in October census, this can be reviewed.
- Kelly Holbrook asked about the Strategic Education Review, which was expected to be at Cabinet and was redacted from public record. Kelly asked if anyone could advise when this would be publicly available.
- Julie Firth explained that any report going to Cabinet is subject to a 5-day call-in period from the moment that Cabinet minutes are released. As such, it would be expected that the lifting of the exemption should be 30th September/1st October.

North Tyneside Funding Formula Consultation 2026/27

Jane Cross talked through the slides on screen. Main points to note as follows:

- No indicative model had as yet been received from Central Government. This being the case, the figures used for the consultation will be those of 2025/26.
 - NFF factors being used
 - Minimum funding guarantees and capping based on affordability
 - Consult on growth options for the growth funding and falling rolls
 - Consult on options to transfer 0.5% from schools to high needs funding.
 - Update in November

Consultation timeline

- Consultation is open online – 6th October
- Briefing sessions are scheduled 14th October 1–3pm and 20th October 10am–12noon
- Closing Date – 24th October
- Wednesday 13th November – results presented to Schools Forum.
- Jane noted the wish to look at further ways to increase engagement in consultation.
- The Chair noted the comment from Laura Baggett within the TEAMS chat that lots of opportunities have been provided in the past to Headteachers. The Chair encouraged all to raise any issues or barriers to non-participation in consultation.

	Recommendations Schools Forum was asked to: - Acknowledge the update on Budget Monitoring 1. ACKNOWLEDGED - Acknowledge the plans for consulting with schools on the 2026/27 National Funding Formula. ACKNOWLEDGED - Agree to delay the allocation of Falling Rolls Funding. AGREED - Agree in principle the allocation of Growth Funding as detailed in table 1. AGREED - Gavin Storey wished to query the allocated figure in the report and wished for clarification. The Chair noted that the approvals requested at this meeting did not contain confirmation of actual figures as they will be presented at Schools Forum following the October census.	
6.	Reports from Services for 26/27 Financial Year Proposal Christina Ponting	
	- Christina Ponting reminded Forum that it was asked, at end of the last Schools Forum meeting, if anyone wanted to call in or have more clarity on reports. - It was highlighted that the last information given was in January 2025 and it referred to SSSB funded services and those services under de-delegation. - Christina stressed the need to make sure all teams had appropriate time to gather additional information. It was suggested and agreed that an email would be sent out separately to Forum querying any information required. ACTION: Christina to send list of areas to members and members would notify Christina if they wished to have more information provided directly to members	CP
9	Any Other Business	
	Anthony Gollings wished to request an update on SEND capital investment on SEND provision. Anthony acknowledged that this could be part of a future Safety Valve update.	

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Item 5

To:	Schools Forum	Author:	Jon Ritchie, Director of Resources						
Date:	12 November 2025	Purpose of the Paper:	<table><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 2026/27 and general update on school financial positions for 2025/26

1. Purpose of Paper:

- 1.1. This paper provides an update on the current information available relating to 2026/27 for each funding block of the Dedicated Schools Grant (DSG).
- 1.2. This report also contains an update on 2025/26 proposed allocations of Schools in Financial Difficulty funding and outlines the progress against the 2025/26 budget monitoring timetable after the first set of monitoring visits to schools.

2. Update on 2026/27 Funding Allocations

- 2.1 The method for allocating funding to schools is set by a Local Funding Formula (LFF), although the Department for Education (DfE) are considering making their National Funding Formula (NFF) mandatory in the future.
- 2.2 Indicative funding allocations are delayed again for 2026/27 due to the timing of the multi-year funding review, DfE have confirmed that they will aim to publish allocations in Autumn. Prior to 2025/26, notional funding allocations were provided in July for planning purposes allowing each local authority to model allocations. 2026/27 is the second year there will be no modelling tool produced although it

is still anticipated that the final DSG allocation to the Authority for 2026/27 will be published in December 2025 using the October 2025 census results.

2.3 For 2026/27, the Authority has again consulted with schools on the Local Funding Formula without being able to share indicative funding allocations. As part of the consultation, schools were asked to consider transferring funding from the Schools Block to High Needs. Guidance states that a local authority can transfer up to 0.5% with agreement from Schools Forum. The request to transfer 0.5% for 2025/26 was not agreed by Schools Forum and was subsequently agreed via a disapplication request to the DfE in-line with the DSG Management Plan.

2.4 The North Tyneside DSG allocation is shown in Table 1, with previous year's figures for comparison.

2.5 Table 1: 2025/26 Allocation compared with prior year actuals

	2022/23	2023/24	2024/25	2025/26	2026/27
	£m	£m	£m	£m	£m
Schools	140.373	147.654	157.669	168.879	tbc
Central School Services	1.724	1.621	1.563	1.609	tbc
High Needs	30.092	32.898	34.288	37.336	tbc
Early Years Block	14.673	14.956	24.478	34.263	tbc
TOTAL	186.862	197.129	217.998	242.087	
Change per Year £m	7.099	10.267	20.869	24.089	tbc
Change per Year %	3.95%	5.49%	10.59%	11.05%	tbc
PUF	£4,539	£4,771	£5,039	£5,452	tbc
SUF	£5,988	£6,277	£6,604	£7,176	tbc
MPPF: Primary	£4,265	£4,405	£4,610	£4,932	tbc
MPPF: Secondary	£5,525	£5,715	£5,995	£6,435	tbc

2.6 The DfE have also not yet published the expected value of the Early Years or Central Schools Services Block (CSSB) funding for 2026/27. As soon as indicative funding allocations are received the Local Authority will begin modelling potential new rates for Early Years for 2026/27 which will be discussed with Early Years subgroup as soon as possible.

- 2.7 2026/27 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 2025/26 Budget Monitoring for Schools

- 3.1 Forum will recall that the overall level of school balances at the end of March 2025 was a deficit of £4.337m compared to a deficit of £2.930m as at March 2024. This represented a decrease in balances of £1.407m. Initial school budget plans submitted in May 2025 projected that the overall balance would be £14.918m deficit by March 2026.
- 3.2 Schools have now completed the first set of monitoring for 2025/26, and the position is shown in table 2 below:

3.3 Table 2: 2025/26 Draft Schools Budget Monitoring 1

Phase	2024/25 Outturn (surplus)/ deficit £m	2025/26 Budget (surplus)/ deficit £m	2025/26 Projected Year end (surplus)/ deficit £m	2025/26 Variance £m
Nursery, First & Primary	(4.167)	(0.379)	(0.767)	(0.388)
Middle	(0.978)	(0.319)	(0.377)	(0.057)
Secondary	7.323	11.259	10.289	(0.970)
Special / PRU	2.159	4.358	3.807	(0.551)
Total	4.337	14.918	12.952	(1.966)

- 3.4 There is an improvement of £1.966m against 2025/26 budgeted deficit with schools now projecting year end balances of £12.952m deficit.
- 3.5 This remains a draft projection to the end of financial year 2025/26 as Forum will be aware there have been difficulties in reconciling payroll transactions and gaining accurate projections following transition to the new system, including treatment of maternity pay. Schools and Finance staff have worked hard to overcome these issues, whilst schools are still finalising BMI position to present to Governors.

4 Schools in Financial Difficulty Funding (SiFD)

- 4.1 Schools Forum are yet to assess bids for schools in financial difficulty funding for 2025/26.
- 4.2 A reminder of the criteria that Schools Forum agreed to make the bidding process for SiFD funding more robust are shown below:
- 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.

5 High Needs Block – Safety Valve Intervention Programme

- 5.1 2025/26 is the third year the authority has been part of the Safety Valve Intervention Programme. It was previously agreed that external consultants would be commissioned to work in partnership with Local Authority officers to review the DSG Management Plan and evaluate the rationale for our current SEND workstreams. The Authority have now submitted the first report to the DfE for 2025/26 which detailed the remodelled DSG Management Plan.
- 5.2 The revised plan recognised the delayed savings in the first 2 years of the programme and identified new initiatives that will help in delivering good outcomes for our children and young people whilst managing demand and spend. 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 however the delay in achieving savings has resulted in a cumulative balance which will not be funded by the original Safety Valve agreement. The High Needs block will have a deficit balance of £8.022m at the end of the DSG Management Plan, this is summarised in table 3 below.

5.3 Table 3 High Needs Block Financial Summary

Year	Balance B/F £m	Planned Expenditure £m	High Needs Funding £m	Block Transfer £m	Safety Valve Funding £m	Balance C/F £m
2022/23	13.511	33.973	(30.092)	0.000	(7.800)	9.592
2023/24	9.592	36.158	(33.306)	0.000	(1.950)	10.494
2024/25	10.494	38.489	(34.778)	(0.753)	(1.950)	11.502
2025/26	11.502	41.075	(37.486)	(0.766)	(1.950)	12.375
2026/27	12.375	41.266	(38.610)	(0.840)	(1.950)	12.241
2027/28	12.241	40.290	(39.769)	(0.840)	(3.900)	8.022

6 Early Years Block Update for 2025/26

- 6.1 Schools Forum will recall, the Early Years block outturn for 2024/25 was a surplus of £2.469m. The 2024/25 surplus balance after final clawback is £2.493. The 2025/26 projection is a break-even in-year position across the Early Years Entitlements; there is no indication of any potential funding shortfall.
- 6.2 Out of the £2.493m opening surplus balance work has been done to model options to allocate an additional £1.000m to the sector, which has now been actioned and paid. 2026/27 modelling will include an appropriate historic uplift in addition to any DfE increased rate.
- 6.3 Following confirmation of the April 2025 National Insurance contributions increase and September 2025 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. This is a new funding stream with effect from September 2025.

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 and Early Years Block funding;
3. Note the budget monitoring progress for schools.
4. Note Schools Forum Subgroup intention to review Schools in Financial Difficulty bids.

Appendix A – Voting Table

North Tyneside Schools Forum Member Roles & Voting								
de-delegation Primary	de-delegation Secondary	scheme for financing schools	consultation on funding formula	General Duties	Retained Duties	all other matters	<i>last updated September 2019</i>	
1	2	3	4	5	6	7		
Voting							Phase	Role
School Members								
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
Other School Members Non Locality Based								
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
Non Schools Members Non Locality Based								
		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 6

To:	Schools Forum	Author:	Jon Ritchie, Director of Resources						
Date:	12 November 2025	Purpose of the Paper:	<table><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 2026/27

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 2025 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 2025/26 funding and general funding principles going forward.
- 2.2 The Authority is now in the 3rd 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 2026/27 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 2 separate briefings with an introduction on the wider funding formula and a focus on the main changes which schools are being asked to consider. The first briefing was recorded and circulated electronically to those schools unable to attend either briefing.
- 2.6 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 2026/27 by the DfE. The consultation exercise was launched for schools to complete between 6 October and 24 October 2024, with each school given the opportunity to submit a single response. The deadline was extended for Academies as due to an oversight they did not receive the information at the same time as maintained schools.

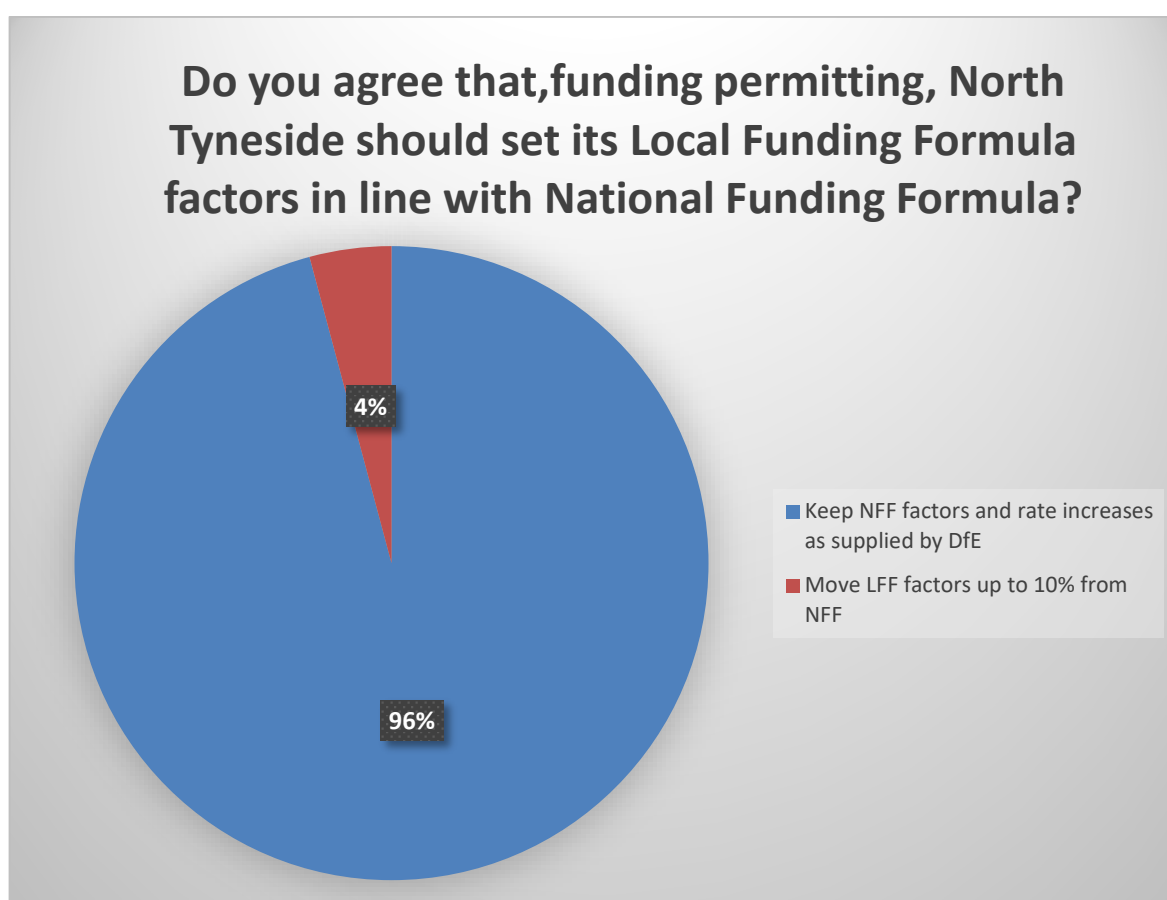
2.7 In total 24 surveys were completed out of a total possible 71, The response rate moved from 39% in 2024 to 34% in 2025. The responses were, split by phase as follows:

2.8 **Table 1: Response Rates to the Consultation by Phase**

Phase	Number Schools Responded	Number in Phase	Response Rate
Primary	17	39	44%
Secondary	5	13	38%
Academies	2	19	11%
Total	24	71	34%

2.9 Responses to the consultation questions are summarised below.

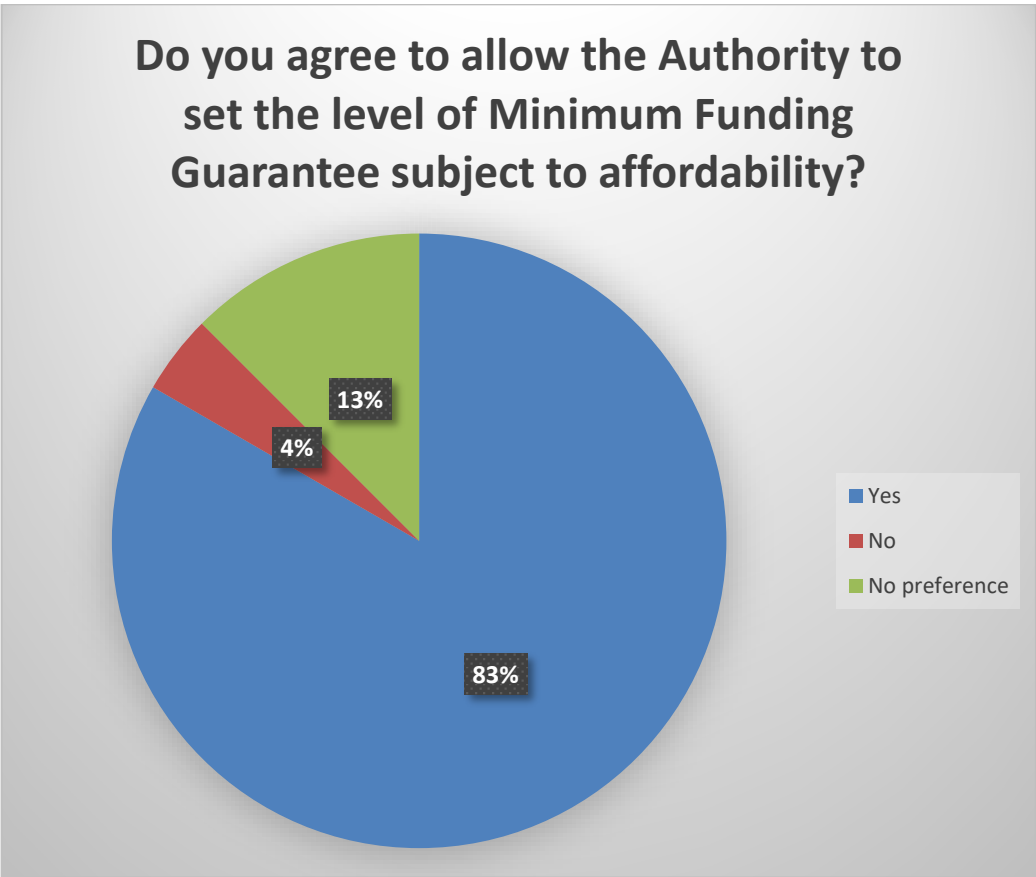
Question – Do you agree that, within the funding allocation, North Tyneside should set it's Local Funding Formula (LFF) factors in line with National Funding Formula?



2.10 The consultation favours staying on NFF factors, funding permitting. 96%, 23 schools agreed with the continuation, with only 4%, 1 school disagreeing.

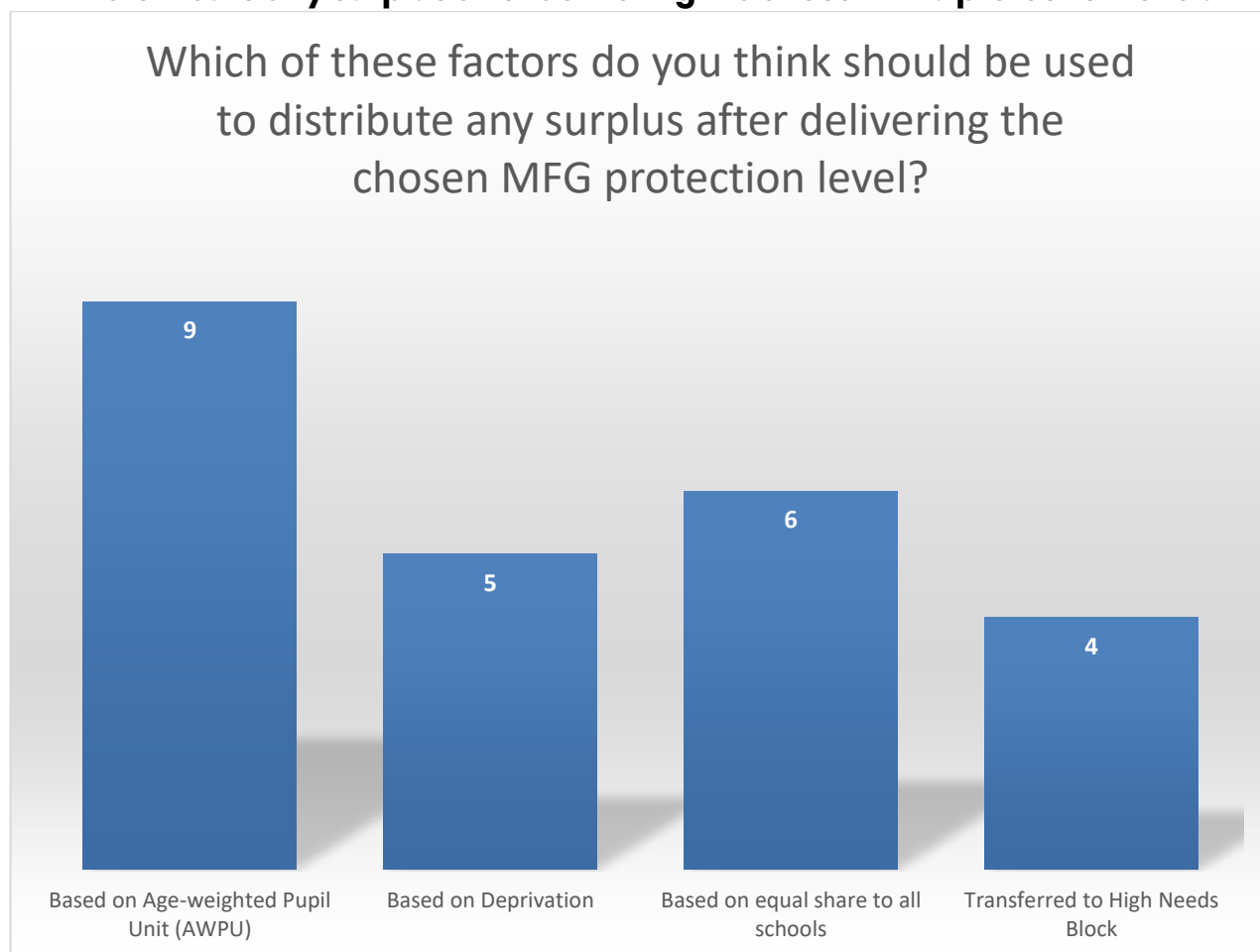
Schools were then asked if they supported the Authority setting Minimum Funding Guarantee (MFG) levels based on affordability. 83%, 20 schools agreed that the Authority should continue to set the MFG.

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



2.12 In reviewing how best to allocate any surplus funding for 2026/27, the preferred option remains to base 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 and 2025/26 there was no surplus.

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



2.14 As part of the funding formula, the DfE calculates the expected requirements for growth funding in North Tyneside maintained schools. Based on the NFF the growth allocated to the Authority for 2025/26 was £0.230m. However, historically Schools Forum have set aside £0.250m this was reduced to £0.200m last year.

2.15 Similarly the DfE also calculates the expected requirements for falling rolls funding in North Tyneside maintained schools and for 2025/26 this was £0.284m. Historically again, Schools Forum have set aside £0.250m last year reducing to £0.100m.

2.16 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:

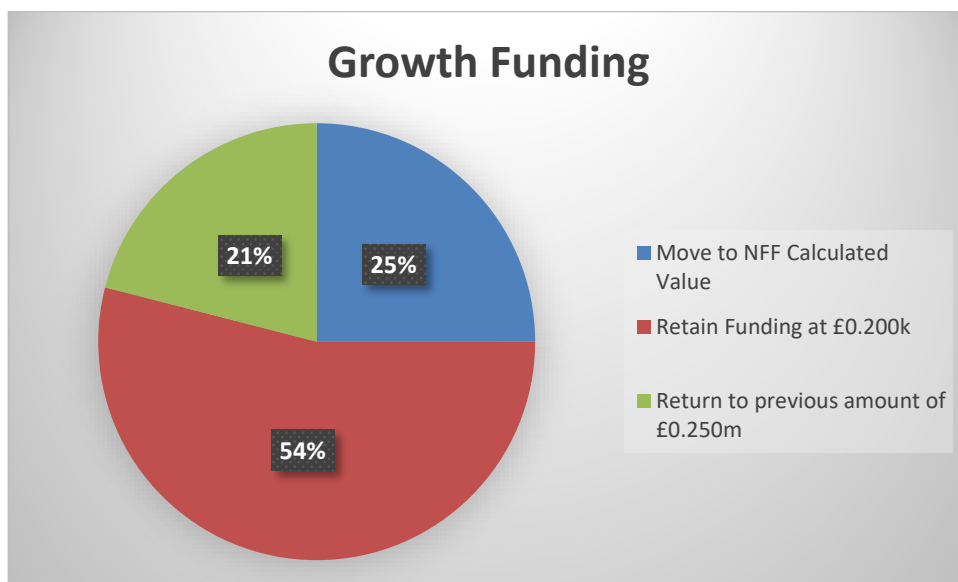
- Continue to allocate £0.200m and £0.100m to growth and falling rolls funding respectively

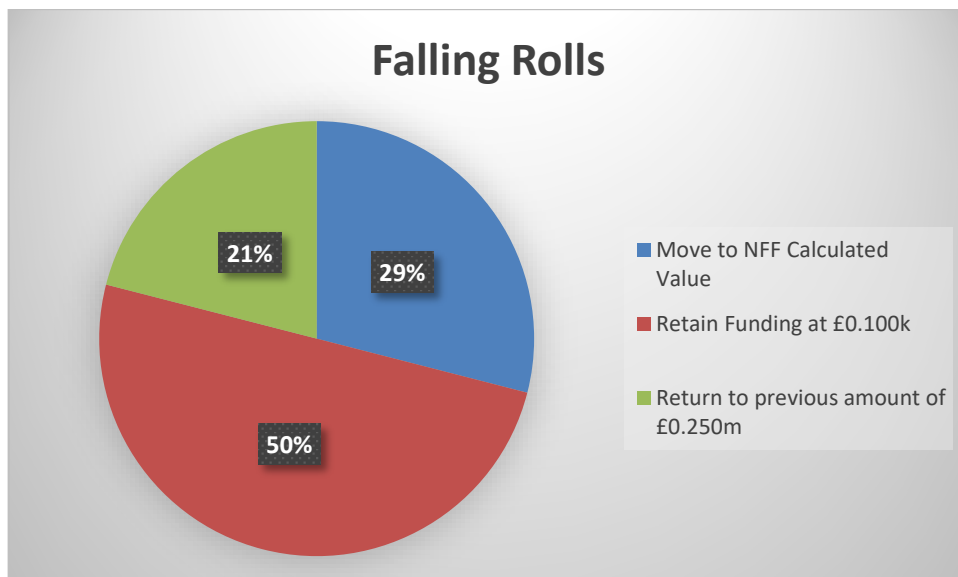
- Set the allocation at the NFF value (£0.230m growth / £0.284 falling rolls) or
- Return allocations to previous levels £0.250m.

2.17 From table 2 below, we can conclude that the majority of schools favour the proposal to keep the reduced funding allocations for both growth and falling rolls, which would subsequently retain the lower impact of any 0.5% transfer, if agreed.

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

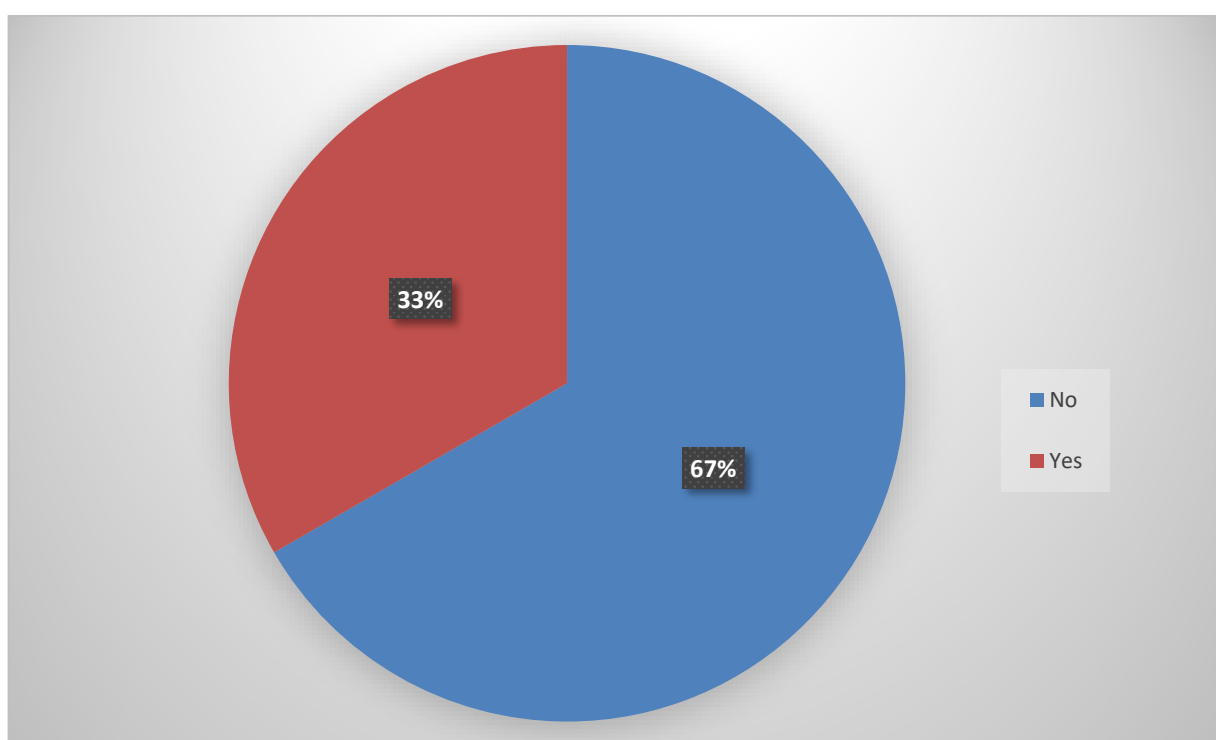
	Growth Funding	Falling Rolls Funding
Agree to keep funding at current level £0.200m growth / £0.100m Falling rolls	54%	50%
Agree to Increase to NFF Calculated Value (Growth £0.230m, Falling Rolls £0.284m)	25%	29%
Return funding to 2024/25 levels £0.250m	21%	21%





2.20 There was no overall agreement to transfer 0.50% of the Schools block to High Needs block, with 33% of schools agreeing with the transfer (compared to 11% last year). The remaining 67% 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.

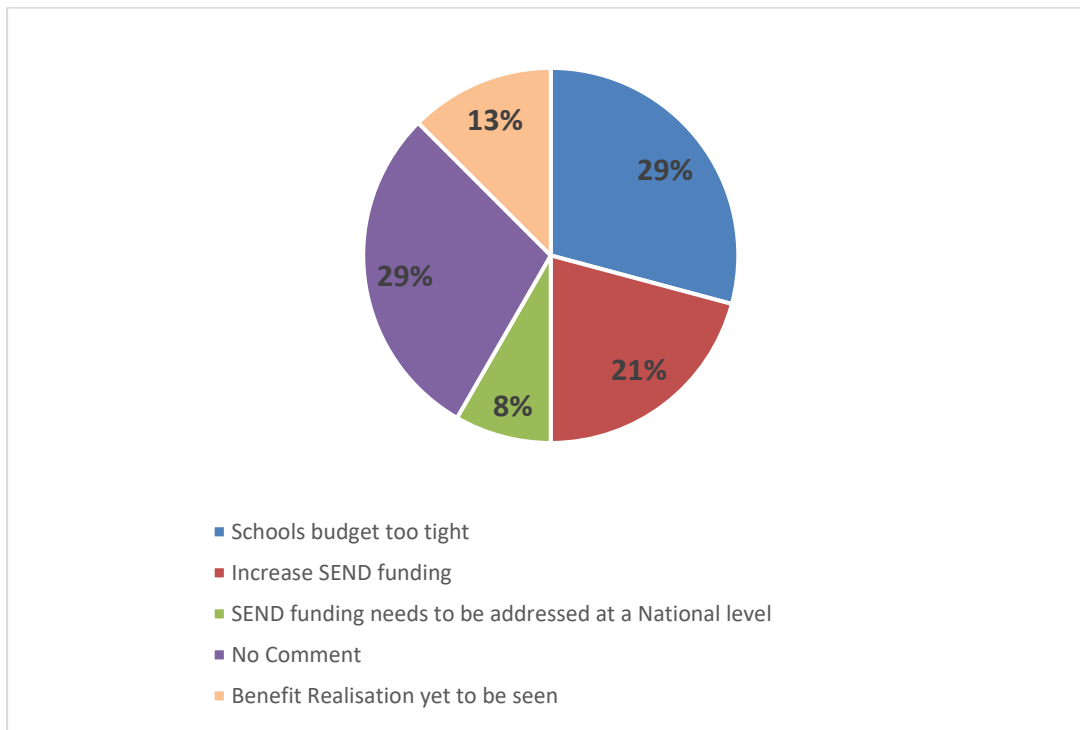


2.22 Of the schools who responded:

- 29% stated their main concern was the impact on school finances when already facing significant other pressures.
- 21% of schools positively responded saying SEND system needed increased funding
- 8% 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 13% felt they need to see more results from the DSG Management Plan.

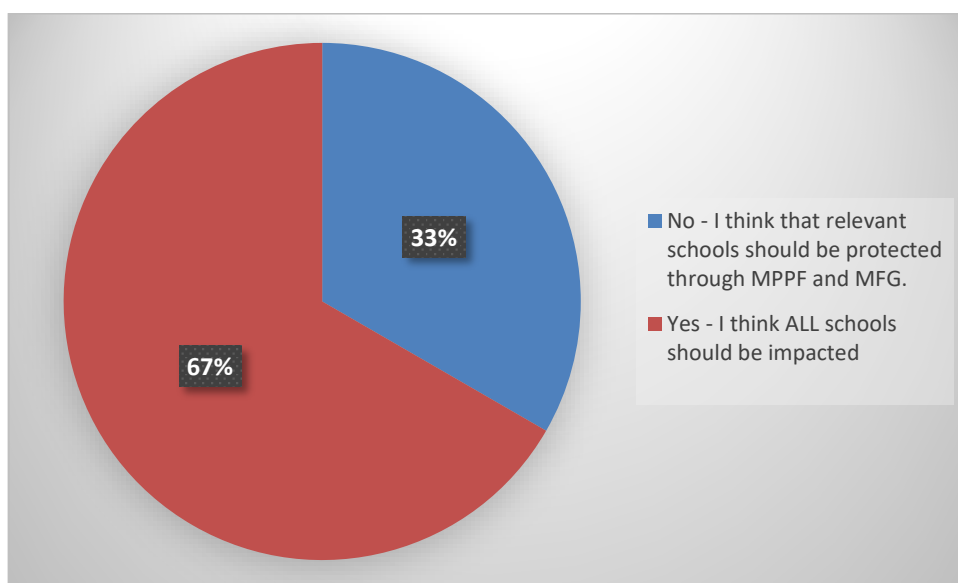
2.24 Question – Additional comments on responses to whether to transfer 0.5% from Schools Block to High Needs Block



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 0.00% (those protected) to 0.86% (higher percentage to compensate for protected schools). In 2025/26 Forum voted that all schools should be affected by the transfer and the range of school contributions went from 0.31% (no protection) to 0.54%.

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 67% 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 DfE. The deadline for submitting any disapplication requests for 2026/27 is 17 November 2025.

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 AWPUs factors be used to distribute any surplus after delivering MFG
4. Agree that Growth and Falling Rolls funding should each be raised back to 2024/25 levels – Growth £0.250m, Falling Rolls £0.250m.
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							
de-delegation Primary	de-delegation Secondary	scheme for financing schools	consultation on funding formula	General Duties	Retained Duties	all other matters	<i>last updated September 2019</i>
1	2	3	4	5	6	7	
Voting							Phase
School Members							Role
x		x	x	x	x	x	First
x		x	x	x	x	x	Primary
	x	x	x	x	x	x	High
	x	x	x	x	x	x	Middle
	x	x	x	x	x	x	Secondary
Other School Members Non Locality Based							
x		x	x	x	x	x	Primary/ First
	x	x	x	x	x	x	Secondary/Middle
		x	x	x	x	x	Nursery
		x	x	x	x	x	PRU
		x	x	x	x	x	Special
			x		x	x	Academy
Non Schools Members Non Locality Based							
		x	x			x	16-19 Providers
			x			x	EY PVI
						x	C of E Diocese
						x	RC Diocese
						x	Trades Union

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