

Meeting	Schools Forum
Date	30 th September
Time	2pm to 4pm
Venue	Teams

Attendees

Chair	Jo Stoaling
Core Group	Becky Biddlecombe (notes) Jo Stoaling, Richard Morgan, Kevin Burnett, Paul May (Cllr), Julie-Anne Kellaway, Roz Lambert, Philip Frankland, Christopher Wilford, Julie-Anne Kellaway, Darryl Freeman, Jean Kelly, Serra Orumlu, Ray Egbufoama, Julia Finch, Louise Malik, Hayley Trotman, Alun Williams
Apologies received	Apologies received: <ul style="list-style-type: none"> • Tim Howes • George Samios • Fiona Skinner

1.	Welcome and Apologies	ACTION
	JS welcomed everyone to the meeting. Addressing apologies.	
2.	Declarations of Interest	
	Members were reminded to complete the declaration of interest forms once per year and to declare anything pertaining to the papers being presented. KB sent in a declaration of interest.	
3.	Minutes of the last meeting	
	Members reviewed the minutes of the last meeting; minutes were approved as an accurate representation. KB previous minute amendments – <ul style="list-style-type: none"> • Item 5 – Future Meetings Structure Jo Marsh is stepping back from the Schools Forum, and confirmed JS will chair meetings this year. Virtual meetings were agreed as the most convenient format by the forum. • Item 6 – DSG Safety Valve requested clarification on the abbreviation “AW” used for Antonia, as it may be confused with Alan Williams, a long-standing reference. • The section on risk indicators was clarified to reflect success criteria, and repeated concerns about delayed progress were removed for clarity. • Item 7 – DfE Grants and SEND Legislation CW raised uncertainty around future SEND legislation • Item 8 – School Balances noted that school balance figures may 	

	<p>appear meaningless without context on why funds are retained. RM provided only the minimum required information under current regulations.</p> <ul style="list-style-type: none"> • AOB – Acknowledgement and Well Wishes The forum expressed gratitude to Jo Marsh for years of service and extended best wishes for a swift recovery. 	
4.	DSG Safety Valve	
	<ul style="list-style-type: none"> • CW gave an update around the DSG Safety Valve. • Plans have been re-submitted as per the DfE, back in April. On the 21st of August our plans had been viewed favourably and would be put in front of a minster for approval. • We have had some correspondence from the DfE. • Still awaiting confirmation from the DfE that we have been accepted back into the Safety Valve. • The B&NES Safety Valve programme will provide 11 million pounds of DfE support to the Council • Large capital programme as part of the plans, we haven't heard anything further on the special free school or AP school • Jo Stoeing and Alun Williams are leading on these. • Alun Williams said he's received some grant funding, since the new government has been put in place, but no decisions have been made around the AP school • AW said a lease had been agreed with B&NES for AP provision on the Abbot Alphege site; October/November we will be moving there. • Long standing commitment around the strategic SEND team. • The team is now fully staffed, and we have the casework load down to a reasonable level. • SEND & AP advice service has been in place for 1 year and is starting to be a good offer for schools. 	
5.	Budget Monitoring 2025-26	
	<ul style="list-style-type: none"> • RM gave an update around Budget monitoring. • Process of showing our financial position has been neglected over the years, we are trying to include this into our monthly meeting structures. • First step is trying to show the DSG position overall. • The financial monitoring of the Dedicated Schools Grant (DSG) has historically been underdeveloped. A new structured approach is being introduced as part of the Safety Valve programme. • Monthly reporting is being aligned with practices from other local authorities, though clarity from the DfE on exact data requirements is still pending. • Current figures show a DSG deficit of just over £12 million, slightly above the projected £11,778 million by 2025/26—primarily due to increased post-16 placements, especially at Bath College. <p>Key cost drivers include:</p> <ul style="list-style-type: none"> • Independent placements averaging £67,000 per pupil, totalling over £5 million. • High numbers of pupils educated outside mainstream settings. • Nearly 1,000 pupils in mainstream schools receiving top-up funding—higher than statistical neighbours. <p>With monitoring, we hope to see a change in these key drivers. A</p>	

	<p>dashboard is being developed to support future monitoring and demonstrate progress.</p> <p>Plans to address these drivers include developing a local special school to reduce reliance on costly independent placements.</p> <p>Comments:</p> <p>LM: In regard to the annex with the detailed figures on it. The line that says statementing, is that the children other than at school?</p> <p>RM: Yes, it is. It's a bad description in our accounting package that we have never changed for some reason.</p> <p>JS: are other authorities that are already doing this as a piece of work, are there certain models that people are using to present the data and challenges data?</p> <p>RM: it is a mixed bag, across the country there are different ways people are doing it, some are doing simple reports like word documents or dashboards. The DfE are requiring data sets. Dashboards are being created and what we are looking to do.</p> <p>AW: You mentioned statistical neighbours, schools exceeding 1000 pupils in mainstream with top-ups</p> <p>RM: it is 940 roughly in our mainstream schools 3-16 with an EHCP, which is higher than our neighbours</p> <p>AW: why is this higher?</p> <p>CW: We do know that we are really struggling with sufficient special school places and that I would say that mainstream schools are holding a number of children who probably have a special school named in their plan. I think that's probably one of the biggest challenges around in the Southwest, but I think we're also driving to make sure that we can accommodate more children in mainstream schools and I think schools are really stepping up to that challenge as well.</p> <p>AW: Once the new special school is built, will that mean that we will have a similar number of special school places for the size of population in B&NES or will it mean we're just transferring those children who are in mainstream into a special school setting and therefore we've still got a greater number of special school places and children on EHCPs</p> <p>CW: process for a new special school has demonstrated a clear sufficiency gap and both current and future need for places. The plan aligns with strategic goals, assuming existing policy conditions remain unchanged. Upcoming Education White Paper may signal a major shift: potentially fewer special school places and increased reliance on mainstream schools or resource bases. Awaiting clarity on national direction before next steps.</p> <p>JS: reflected on the ongoing debate around mainstream versus specialist education, noting that while many young people can thrive in mainstream settings with the right support, others require highly bespoke environments that mainstream schools cannot provide. She emphasised the importance of balancing capacity across both types of provision and suggested that projects at Culverhay, could meet B&NES needs and empower families and schools to make informed decisions about the most suitable educational setting for each child. Final decisions will depend on the forthcoming Education White Paper.</p> <p>RM: In terms of the overall pupil numbers, what we're observing is that our actual number of pupils of school age is relatively stagnant. It's not dropping like some of the other authorities and of course we do have house building, shall we say targets which we will anticipate will create some growth in people numbers. There are some pockets of relatively large pupil number drops, but we're also seeing still one or two schools with significant pupil number increases and overall, we're relatively</p>	
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	<p>stagnant. In terms of the impact on the high needs block, we don't see that impact in the high needs block.</p> <p>CW: The local plan is now published. So, it's out there for consultation and people can go on there and see where we are highlighting the areas where we expect the housing growth to be.</p> <p>JS: I suppose if there is a huge wait, is there a sort of Plan B on the Culverhay site?</p> <p>CW: explained that the immediate priority is to proceed with flattening the site, having relocated the AP provision and begun arrangements for remaining facilities. A master planning process is underway to explore all potential outcomes whether one school, two schools, or none depending on government decisions. He emphasised the uncertainty around DfE funding and policy direction, noting the council may need to consider self-funding if sufficiency remains the target, but support is withheld. Alternative options for accommodating pupils are also being explored, including other land or adaptable schools in B&NES. The site's education covenant and adjacent school field limit non-educational use, and planning continues amid frustration over the lack of clarity from the DfE.</p>	
6.	Budget Planning 2026-27	
	<ul style="list-style-type: none"> RM provided an update around the Budget for 26/27. <p>Delay in DSG Provisional Allocations</p> <ul style="list-style-type: none"> The DfE has postponed the release of 2026–27 provisional DSG budget allocations due to the late national budget and internal changes. These are now expected in late November or early December, likely after the 25th November budget announcement. <p>National Funding Formula (NFF) Update</p> <ul style="list-style-type: none"> A policy paper has been issued outlining the DfE's intention to roll 2025–26 additional grants into the mainstream schools funding formula for 2026–27. The methodology for this integration has been shared, helping local authorities prepare ahead of formal allocations. <p>Local Formula Stability</p> <ul style="list-style-type: none"> No significant changes are expected to the local funding formula for B&NES, as the national formula does not propose adjustments affecting the area. The local formula will continue to mirror the NFF closely. <p>Consultation Requirements</p> <ul style="list-style-type: none"> Only two questions are proposed for this year's consultation: <ol style="list-style-type: none"> Whether to continue the 0.5% transfer from the school's block to the high needs block (a practice maintained for 11 years) How to adjust formula factors to align with available resources, given that full NFF funding has not been achievable in recent years. RM suggested that given the limited scope of changes, a shortened four-week consultation period instead of the usual six weeks, to streamline the process and meet deadlines more 	

	<p>easily. Forum feedback was requested on this proposal. Early Years Funding Changes</p> <ul style="list-style-type: none"> • The DfE has separately indicated that the pass-through rate for early years funding will increase from 96% to 97% in 2026–27. This won't significantly change the amount held back as funding has increased. • Final funding details and allocations will be confirmed by the DfE in late November or early December. Until then, planning will continue based on the current policy guidance. <p>Comments:</p> <p>RL: wanted to ask about the that 1% difference and whether there's any chance that could be used to form some sort of uplift for early years settings that have a lot of children with extra needs and ISF?</p> <p>RM: explained that for 2026–27, local authorities will be allowed to retain only 3% of the early years block for central services, down from 4% this year. However, due to significant growth in the block, the actual funding retained will be similar in value. This means the ability to centrally fund services remains largely unchanged, though uncertainty remains about whether any additional mechanisms will be permitted by the DfE to support early years funding. Any changes would require consultation with settings, but as of now, no specific guidance has been issued by the DfE regarding such options.</p> <p>PF update: explained that last year's reduction in retained early years funding from 5% to 4% was redistributed across all providers, effectively increasing the per-child funding rate beyond the DfE's uplift. A similar approach for 2026–27 would require consultation with the early years reference group and a review of current funding formula guidance to determine if redistribution is feasible. Any changes must be finalised by the end of January to meet the DfE's 28th February deadline. He emphasised that any funding adjustments would likely be interim, as the DfE plans to review the entire early years entitlement funding system in 2026, potentially altering how funding is allocated to councils in future years. PF also raised concerns about the compressed timeline for sector engagement due to December closures and noted an increased administrative burden, with councils now required to submit three early years censuses annually instead of one potentially adding data demands and costs for providers.</p> <p>KB: You may not be able to fully fund the factors in the NFF formula if the transfer of 0.5% goes from school's block to high needs? Is that a certainty at this time? If money from the school's block doesn't go into high needs what effect might that have on the high needs?</p> <p>RM: that is what normally happens. Richard Morgan reiterated the importance of continuing the 0.5% transfer from the school's block to the high needs block, which equates to approximately £700,000 and has been consistently supported by schools over the past 11 years. He explained that while the DfE's use of provisional allocations often prevents full funding of National Funding Formula (NFF) factor values, B&NES is among the 30–40% of authorities closely mirroring the NFF and is not required to make further adjustments. The transfer itself does</p>	<p>agreed</p>
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	not affect school-level funding mechanisms but is critical to maintaining the integrity of the DSG safety valve plan without it, a £700,000 shortfall would emerge. If the Schools Forum were to reject the transfer, the local authority could apply to the Secretary of State to impose it, a step the DfE would likely support. RM expressed hope that schools would continue endorsing the transfer to avoid escalation and maintain continuity.	
7.	Education Commissioning Intentions 26-27	
	<p>Richard Morgan informed the group about the upcoming recommissioning of two education service contracts. Noted that the paper is for information only, highlighting the need to consult schools and trusts on upcoming contract negotiations. Two specific contracts are due for renewal in the next financial year, and the purpose of the update is to ensure all stakeholders are aware of the renegotiation process.</p> <p>LM asked whether renewal costs are included in future budgets.</p> <p>Contract Renewal and Budgeting: RM confirmed that the renewal of the two education service contracts is already factored into future budgets at similar values, and the forum was informed of the upcoming renegotiations to ensure all trusts and schools are aware.</p> <p>Reintegration Targets and Impact Monitoring: KB asked about reintegration targets for the HERS service, and CW responded that there is a target of around 30-40% reintegration annually, with further details to be clarified.</p> <p>JS and AW suggested that future contract reviews should include impact assessments to inform value judgments. CW noted the need for further detail from OD.</p>	
8.	A.O.B	
	<ul style="list-style-type: none"> Richard Morgan announced his planned retirement at the end of the financial year, with Christopher Wilford outlining plans to advertise the role and encouraging interested parties to apply, ensuring a smooth transition for the school's finance function. High needs working party, sat alongside Schools Forum to look at work in more detail. Laura Donnelly hosts these meetings. CW to speak to Laura about the possible continuation for that group. School Forum membership to be reviewed, gap for maintained school governor. CW to make the request through the HUB. Need for Post 16 member to attend the forum. 	
9.	Date of next meeting	
	2nd December 2025 @ 2pm	