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| Meeting | Schools Forum |
| Date | 27 th January |
| Time | 2pm to 4pm |
| Venue | Teams |

Attendees

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| Chair | Jo Stoaling |
| Core Group | Jo Stoaling, Richard Morgan, George Samios, Kevin Burnett, Roz Lambert, Philip Frankland, Christopher Wilford, Julie-Anne Kellaway, Darryl Freeman, Ray Egbufoama, Julia Finch, Louise Malik, Hayley Trotman, Laura Donnelly, Serra Orumlu, Chris Thomas-Unsworth, Becky Biddlecombe (notes) |
| Apologies received | Apologies received: <ul style="list-style-type: none"> • Simon Parker • Jeff Wring • Jean Kelly • Stuart Donnelly • Alun Williams • Jean Kelly |

| 1. | Welcome and Apologies | ACTION |
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| | 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. | |
| 3. | Minutes of the last meeting | |
| | <ul style="list-style-type: none"> • Members reviewed the minutes of the last meeting; minutes were approved as an accurate representation. <p>Kevin raised a few points regarding:</p> <ul style="list-style-type: none"> • The safety valve • The budget monitoring possibilities • Free school meals grant • Information around DSG to high needs transfer, so we can understand the whole process and explain cost impacts • Free school meal funding under NFF, will this be affected? <p>Richard updated Kevin as follows:</p> <ul style="list-style-type: none"> • Safety Valve: This will be covered by a verbal report from CW today • Budget monitoring: RM will bring proposals for budget monitoring to the March meeting to explain how the high needs block is working and look at future trends. • Free school meals grant. We haven't got the exact information regarding this as of yet. Children under universal credit will not be | |

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| | <p>eligible for pupil premium funding, which has recently been announced by the DfE.</p> <ul style="list-style-type: none"> • DSG budget and HN transfer: RM will present a paper in March • FSM funding under NFF: The number of people for free school meals will increase, the funding values within the NFF may be adjusted for those who are eligible. More information to follow. <p>Chris Wilford updated members regarding the Safety Valve.</p> <ul style="list-style-type: none"> • The local authority remains in a holding pattern with the DfE regarding the Safety Valve programme. • Two recent meetings with DfE advisors have taken place, but the advisors have largely been in “listening mode”, offering no new information. • The Safety Valve process is formally paused, with an £11 million lump-sum payment still outstanding. • Although the authority had been told it had completed all requirements to re-enter the Safety Valve agreement, national developments have overtaken the process, including Ministerial changes and the forthcoming SEND White Paper • The DfE has indicated that no further decisions or updates will be provided until the White Paper is published. • Recent DSG settlement information (released around Christmas) included early indications about how authorities with historic DSG deficits—now widespread nationally—may be treated. • These arrangements are expected to be announced alongside the White Paper, though there is concern this may take longer. • From 2028, the DfE will assume responsibility for high-needs funding payments (as confirmed in the national budget). • Whether the Safety Valve agreement will resume in its previous form, advisors are currently unable to provide further guidance, as they are effectively constrained (“hamstrung”) until the White Paper is released. • The entire process is paused pending national policy decisions. • B&NES received a letter around the two Free Schools (Greenways Special School and Sulis AP), just before Christmas. It said that both schools could proceed. The letter also made a financial offer around capital for 3years if the LA thinks it could deliver provision other than through the two Free Schools. The Council are considering this and whether they could deliver places any quicker through a different route. Decision has to be made by end of Feb 2026. | |
| 4. | DSG Budget 2026-27 | |
| | <p>Richard presented the DSG budget for 2026-27, detailing provisional allocations, formula factors, and the impact of rolled-in grants, school-level impacts, and the implications for high needs and special schools.</p> <p>Richard outlined the provisional DSG allocation of £231.6 million, noting significant increases due to expanded early years provision and the rolling in of grants. The local authority is moving closer to the National Funding Formula (NFF) plus area cost adjustments (ACA), funding at 99.598% of the NFF with ACA, after the high needs transfer.</p> <p>Louise requested access to the data underpinning the APT for all schools to</p> | |

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| | <p>assist with budget planning, especially for academies. Richard agreed to provide the dataset, as was done in the previous year, and will coordinate distribution to trusts.</p> <p>Richard reported a reduction in the number of schools on the minimum funding guarantee and minimum per pupil funding but highlighted that some schools will see a 0% increase, mainly those on the minimum per pupil funding level. Louise emphasised the financial pressure on these schools, and Kevin Burnett proposed sending a letter from the forum to MPs and the DfE to express concerns.</p> <p>SF agreed to send letter and JS asked RM to draft technical aspects</p> <p>Richard explained that the DfE has suspended the high needs block national funding formula for 2026-27, resulting in no inflationary increase. The forum discussed the need for the high needs working group to review banding values and agreed that any increases would add to the DSG deficit, with no further reductions to school budgets beyond the agreed 0.5% transfer. Details of where the increases in banding would come from are apparently expected in the White Paper.</p> <p>Richard clarified that special schools would receive a consolidated grant matching previous allocation, but with no additional increases. The forum discussed the need for clarity from the forthcoming White Paper on the future of high needs funding and the transition to DfE management in 2028.</p> | |
| 5. | Early Years Funding 26-27 | |
| | <p>Philip presented the Early Years funding formula for 2026-27, explaining the increase in indicative budget, the move to termly census, and the rationale for maintaining current formula factors, with the forum unanimously agreeing to adopt the proposed rates.</p> <p>Philip explained that the indicative Early Years budget has increased due to the full rollout of 30-hour provision and higher DfE funding rates, but the formula factors remain unchanged pending a national review expected by summer 2026.</p> <p>Philip described the shift from annual to termly census, which will result in multiple in-year budget adjustments and increased administrative workload for both the council and providers. The DfE is providing a higher council rate to offset potential shortfalls, but any surplus will be managed under DSG rules.</p> <p>Philip confirmed that the council's drawdown for mandatory services has decreased to 3% of the new budget, which may impact long-term service provision. The deprivation supplement remains at 7p targeted and 2p universal per hour for three- and four-year-olds, with no increase this year due to budget constraints.</p> <p>Philip reported that the Early Years reference group supported the proposed formula, and the forum voted unanimously to adopt the funding rates for 2026-27. Philip committed to updating the forum as further DfE guidance becomes available.</p> <p>RL made the point that the percentage increase for E/Yrs looks good but with the limited ability to charge, it is still very hard to make ends meet – addressing SEND needs. In a recent survey of fellow E/Yrs providers, every</p> | |

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| | setting is saying they cannot meet SEND needs with given resources | |
| 6. | High Needs Working Group – Exceptional Funding for EHCPs | |
| | <p>Laura presented the high needs working group's proposal to standardise exceptional funding rates for alternative provision and teaching assistants, aiming to ensure equity and value for money, with the forum agreeing to implement the new guidance from September 2026.</p> <p>Laura explained that a high proportion of young people are funded outside the established banding system, leading to inconsistencies and potential profiteering. The new guidance will set standard rates for alternative provision and support staff, with exceptions allowed only in justified cases.</p> <p>The working group consulted with local providers and trusts, who agreed to align with the new rates. Laura noted that some providers may need to expand capacity, and that the move will help level the playing field across schools and trusts.</p> <p>The new rates and guidance will be implemented from September, with engagement sessions and calculation tools provided to schools. The high needs working group (HNWG) will oversee the rollout and address any issues arising.</p> <p>Forum members, including Kevin Burnett and George, discussed the implications for in-school support versus alternative provision and the process for funding changes. (HNWG will ensure these points are included in discussions as part of the preparation for the new system's implementation.) The forum unanimously supported the proposal, with thanks recorded to the working group and participating schools and Trusts.</p> | |
| 8. | A.O.B | |
| | <p>Closure of RHS (below Y5) + KES site changes</p> <ul style="list-style-type: none"> • Members discussed the recent closure of Royal High (below Y5) and site changes at King Edward's, outlining the local authority's actions to support affected families and ensure sufficient school places. • Chris reported that the admissions team has reached out to Royal High to provide guidance to families on securing new school places, particularly given the proximity to the primary admissions deadline. Not all families are B&NES residents so also been in contact with S. Glos. • Jo Stooling and Philip discussed the potential impact on local primary schools and early years provision, noting that few funded children were enrolled at Royal High and that other independent schools may have capacity to absorb displaced pupils. • Laura confirmed that no children with Education, Health and Care Plans (EHCPs) are affected by the closure, and there are no anticipated needs assessments resulting from the change. <p>Update re: RM replacement</p> <ul style="list-style-type: none"> • Chris updated the forum on the ongoing recruitment process to replace Richard, who is retiring • Chris explained that the local authority has gone out to recruitment twice for Richard's replacement without success and is now considering alternative strategies, including upskilling corporate | |

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| | <p>finance colleagues or appointing an interim.</p> <p>Consultation regarding LGPS</p> <ul style="list-style-type: none"> • Julia highlighted the ongoing consultation regarding LGPS pension inclusion for contracted-out providers, flagging it as a risk for the local authority and suggesting it be included in the forum's correspondence on funding pressures. • Julia informed the forum about the current consultation on LGPS pension provision for contracted-out services, noting the potential impact on several local providers and recommending it be mentioned in the forum's letter to the DfE. | |
| 9. | Date of next meeting | |
| | 17th March 2026 | |