

Meeting	Schools Forum
Date	7 th July 2026
Time	2pm to 4pm
Venue	Teams

Attendees

Chair	Jo Stoaling
Core Group	Jo Stoaling, Emma Whitehead, George Samios, Kevin Burnett, Christopher Wilford, Jean Kelly, Antonia White, Ray Egbufoama, Julia Finch, Louise Malik, Laura Donnelly, Alun Williams, Zoe Davey, Cllr May
Apologies received	Apologies received: • Roz Lambert • Phillip Frankland • Julie-Anne Kellaway • Chris Thomas-Unsworth

1.	Welcome and Apologies	ACTION
	JS welcomed everyone to the meeting.	
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	
	Members approved the minutes as an accurate representation.	
4.	DSG Outturn report for 2025/26	
	Emma provided an update on the Dedicated Schools Grant (DSG) deficit for 2025-26, explaining the current status, the lack of information for 2026-27, and responded to questions from Kevin Burnett regarding the impact on the schools block and monitoring practices, with input from Zoe Davey and Louise on dashboard reporting. Emma reported that the DSG deficit at the end of 2025-26 remains significant, with the high need's stability grant potentially providing relief if the SEND reform plan is approved. She noted the absence of information for the 2026-27 financial year and expressed disappointment at the lack of departmental updates. In response to Kevin Burnett's question, Emma confirmed that, as it stands, the schools block will not be impacted by the DSG deficit, and the council will need to find a mechanism to recover any remaining deficit not covered by the DfE, specifically the 10% if the SEND reform plan is approved. Kevin inquired about monitoring trends in DSG over time, and Emma agreed to develop a dashboard for trend analysis, similar to practices in North	

	Somerset, with support from Zoe Davey and Louise who endorsed this approach as a good way of reporting.	
5.	2025/2026 Schools Balances	
	Emma presented the statutory report on maintained schools' revenue balances for 2025-26, discussed the absence of a clawback policy in Baines, and addressed questions from Kevin Burnett, Alun, and George Samios regarding the context and transparency of balances and comparisons with academies. Emma explained that reporting maintained schools' end-of-year balances is a statutory requirement, noting a gradual decrease in balances and the lack of a current policy to claw back excess funds in Baines. Kevin Burnett requested that the minutes reflect the limited context provided by the figures, emphasizing that without understanding the reasons behind the balances, the data is of limited use, and Jo agreed to note this. Alun highlighted that academy trusts also report financial returns, sometimes by school, and that the DfE can claw back reserves exceeding 20% of income, though this is rarely enacted. Emma confirmed that some local authorities, such as North Somerset, have clawback policies but rarely enforce them if spending plans are in place, providing context for Baines' current approach. George Samios shared that his school's healthy balance would decrease significantly due to necessary spending to maintain provision, illustrating the importance of context behind reported figures.	
6.	SEND Reform Plan	
	Christopher Wilford updated the forum on the successful submission of the SEND reform plan by the June 19th deadline, described the collaborative process involving multiple stakeholders including Emma, George Samios, and Alun, and outlined next steps, funding implications, and the development of inclusion bases. Christopher reported that the SEND reform plan was submitted on time, following extensive workshops and collaboration with partners such as Emma, George Samios, and Alun, ensuring broad input into the plan's development. : If the plan is approved, the DfE will release 90% of the stability grant, significantly reducing the council's deficit, with the remaining 10% (estimated at £3-4 million) to be managed locally; further guidance from central government is awaited. The plan's implementation will involve forming a core transformation team comprising local authority staff, health colleagues, and trust representatives, with funding allocated for transformation and opportunities for additional trust involvement. A significant component of the reform plan is the development of inclusion bases, with new guidance received post-submission; a related paper will be discussed at School 7, and ongoing monitoring by the DfE is expected. In response to George Samios, Christopher clarified that the new primary AP	

	at the Abbott Alfage site will open in September with North Star, and that 10% of the experts at hand funding is reserved for transformational activities, including project management and supporting trust involvement. George Samios raised concerns about the Schools Forum's decision to base high needs funding on Section B banding rather than Section F provision costs, leading to funding shortfalls; Laura Donnelly and Alun explained the historical context, operational challenges, and the potential for reviewing exceptional funding through the high needs working group. George Samios highlighted a mismatch between banded funding (based on Section B of EHCPs) and the actual costs of provision required by Section F, resulting in significant shortfalls for schools, as illustrated by a £100,000 gap in his own analysis. Laura Donnelly explained that the decision to use banding was made in 2018, and changing to a Section F-based system would require rebranding over 2,800 plans, a resource-intensive process with substantial operational and financial implications. Laura noted that banding is intended to balance out over- and under-funding across cases but acknowledged the need to review the high number of children on exceptional funding packages, particularly in special schools. The forum agreed that the high needs working group would next focus on reviewing exceptional funding, with Laura offering to scrutinize all exceptional cases and report back on opportunities to redistribute resources within the existing system. Jo and Laura confirmed that the high needs working group will continue into the next year, with George volunteering to represent maintained primary head teachers, and plans to schedule meetings and training sessions to address standardization and funding issues.	
7.	A.O.B	
	Emma Whitehead informed the forum of a recent decision, agreed with Nick Fortt, to apply the uplift for top-up funding to early years settings, with the financial impact being less than £20,000, and received unanimous support from the forum. All members agreed with Emma's proposal.	
8.	Actions	
	DSG Monitoring Dashboard: Produce and share a dashboard that provides trend analysis of DSG balances over time, similar to the approach used in North Somerset, for Baines Schools Forum. (Emma) Early Years Top-Up Funding Uplift: Apply the agreed uplift for top-up funding to early years settings in Baines and inform Schools Forum of the change. (Emma) Exceptional Funding Review in High Needs Working Group: Review the current approach to exceptional funding within the high needs working group and report back to Schools Forum with findings and potential opportunities for system improvements. (Laura)	

	• Scheduling High Needs Working Group Meetings: Send out meeting links and schedule dates for the high needs working group for the next academic year, aiming to hold a meeting before the first Schools Forum on 13th October. (Laura) • Standardization of Provision Map Cost Training: Reschedule and communicate the training session on standardizing costs for provision maps to all relevant schools, aiming for an October half-term launch. (Laura) Next meeting: 13th October 2026	
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