

Meeting	Schools Forum
Date	17 th March
Time	2pm to 4pm
Venue	Teams

Attendees

Chair	Jo Stoaling
Core Group	Jo Stoaling, Richard Morgan, George Samios, Kevin Burnett, Jane Stagg, Kate Wilson, Roz Lambert, Philip Frankland, Christopher Wilford, Julie-Anne Kellaway, Antonia White, Liz Beazer, Ray Egbufoama, Julia Finch, Louise Malik, Laura Donnelly, Chris Thomas-Unsworth
Apologies received	Apologies received: • Alun Williams • Jean Kelly • Emma Yates • Darryl Freeman • Hayley Trotman

1.	Welcome and Apologies	ACTION
	JS welcomed everyone to the meeting, introduced a new member, Jane Stagg. Addressing apologies also.	
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 reviewed the minutes of the last meeting; minutes were approved as an accurate representation subject to a correction to the Early Years deprivation supplement - clarifying that the universal supplement should be 2p, not 7p, and Jo agreed to have this corrected. Kevin raised matters arising from the previous meeting's minutes, which Jo and Richard agreed to action, including a discussion of the Schools Forum letter distribution. (Other points were covered on the agenda.) Kevin proposed that the Schools Forum letter sent to the DfE should also be distributed to local MPs and all schools; Richard confirmed the letter had gone to the DfE and would be available to all schools via the agenda, and Jo agreed to action wider distribution with Becky.	
4.	SEND Reform Plans	
	CW gave a verbal update around SEND and began with the following points: - Decision around new schools / cash alternatives from DfE: LA will	

	be proceeding with Greenways (120 place Special School) but will accept cash deal instead of a new AP school on Culverhay site. Instead of a new AP school, the money will be used to convert Abbott Alphege to a 55-place, all-through AP provision – run as intended by MSNP. These decisions have been sent to DfE and are now subject to ministerial approval - RM's replacement: Been out to advert three times and so far been unsuccessful. So working on other plans to cover his role (probably internal changes) - DSG Stability Grant: DfE taking on High Needs funding from 2028 and 90% of all HN deficits up to end of 2025/26. But we don't know what's happening from 2026 to 2028! - White paper: Now landed. There's a lot of information around SEND reforms and these will need legislative changes. LA is working on current regulations while preparing for the changes in three years' time. As you might imagine, there is a lot of discussion around the transition to the 'new changes' between now and 2029 Chris and Antonia then explained that the DfE requires all local areas to develop a co-produced SEND reform plan by June 19, with a draft due in May, involving schools, health partners, ICBs, and parent forums, and that the plan's approval is tied to the release of significant deficit-reducing funding. (90% of High Needs deficit up to April 2026.) Christopher and Richard detailed new funding announcements: £1.6 billion for inclusion, £1.8 billion for 'experts at hand' (e.g., therapists, psychologists), and £3.7 billion in capital for inclusive education, all over three years, with distribution details pending. Antonia is leading the work on the SEND Reform Plan. The biggest challenge is to ensure co-production of the plan and co-ownership of the plan – especially including families and young people, in the very tight timetable. The LA are trying to establish what they can meaningfully do in this short time period. Fortunately, B&NES has a Local Area Inclusion Partnership Improvement Plan which was co-produced and provides a good basis on which to finalise the draft SEND Reform Plan. Antonia will be requesting increased representation from education settings in the Local Area Inclusion Partnership and proposing workshops and toolkit reviews, (check how it expresses outcomes and whether those outcomes are reasonable), to ensure the SEND reform plan reflects all partners' input. Olwyn confirmed that local authorities in the Southwest are collaborating on the SEND reform plan, sharing strategies and preparing a regional response to the DfE consultation, with health and education partners involved.	
5.	DSG Stability Grant	
	DSG Stability Grant and Financial Implications: Richard presented details on the DSG stability grant, explaining that the DfE will cover 90% of the local authority's high needs deficit upon approval of the SEND reform plan, with the remaining deficit and future arrangements still under discussion. Richard explained that contingent on SEND reform plan approval, the DfE will pay approximately £42 million in autumn to cover 90% of the registered high	

	needs deficit, improving local authority cash flow, with the remaining deficit of £5m to be managed locally. It was noted that failure to submit an approved SEND reform plan by the June deadline could delay or forfeit grant payments, and the DfE may intervene in local authority SEN services if plans are deemed insufficient. Olwyn described ongoing regional meetings among Southwest local authorities to share approaches and support each other in developing effective SEND reform plans, aiming for consistency and collective advocacy.	
6.	High Needs Working Group (HNWG) – Inflationary increases for top up funding / High Needs Waiting Well	
	Richard presented proposals for inflationary increases to high needs top-up funding, the rationale for targeted support, and the constraints imposed by DfE oversight, with the forum providing a positive steer for implementation. The HNWG proposed increasing top-up funding for special schools by 4.27% and for resource bases by 3.45% from September, based on analysis of spending patterns, comparison with inflationary increases in mainstream schools and the need to offset inflation; with the forum consulted for feedback. Richard outlined plans to increase high needs targeted support for mainstream schools with above-average numbers of EHCPs, raising the per-pupil allocation to approximately £5,400, funded from the high needs block. Richard clarified that no additional high needs funding is currently allocated to early years inclusion. Louise and Richard discussed the risk that DfE may not approve all proposed increases, emphasizing the need to align with DfE expectations to secure the stability grant and avoid future reversals. Implementation Timeline: confirmed that, pending DfE feedback, the new top-up rates would be communicated to schools for implementation from September 1. Top-Up Funding for Delayed EHCPs – ‘Waiting Well’: Laura proposed, and the forum supported, a new policy to provide interim top-up funding for children and young people whose EHCP needs assessments exceed the statutory 20-week deadline, aiming to support schools and families during delays. Laura explained that from April, schools will receive £4,000 per pupil from week 20 of an overdue EHCP needs assessment, replacing this with the appropriate banding once the plan is finalized, to provide certainty and support during assessment delays. The policy applies to a small number of cases (currently around 34), with an estimated annual cost of £100,000–£120,000 and is not expected to significantly impact the DSG. Laura agreed to explore whether similar interim funding or backdating could be applied to early years inclusion support, to be discussed further in the high needs working group. Laura noted a recent 30% increase in EHCP requests, primarily from parents, and acknowledged the potential for further increases due to the white paper,	

	with plans to address capacity challenges in the team.	
7.	DSG Monitoring report	
	Richard presented the latest DSG monitoring report, highlighting a projected £14.1 million high needs overspend, and discussed the implications for future DSG management and the impact of upcoming national reforms. Richard shared the latest figures showing a £14.1 million projected overspend in the high needs block, with overall DSG pressures driven by independent special school placements, top-ups, and bespoke packages. After 2028, the DfE will assume responsibility for the high needs block, and while current regulations protect school budgets, the exact mechanism for managing future overspends remain unclear. Laura added that the forthcoming white paper is expected to introduce rigid funding frameworks and support packages, likely reducing the possibility of DSG overspends in the long term.	
8.	PDS report on SEN	
	Laura reported on the recent scrutiny of the SEN service, highlighting improvements in complaints, tribunals, mediations, statutory timeframes, and quality assurance, with ongoing efforts to enhance annual review processes and multi-agency collaboration. Laura summarised recent progress in reducing complaints, improving timeliness of EHCPs, and strengthening quality assurance, attributing gains to increased team capacity and multi-agency quality assurance initiatives. Efforts are underway to improve the annual review process, particularly by issuing 'no change' letters for plans between key stage transfers, in line with the code of practice, and by leveraging AI for routine tasks.	
9.	School Forum Structure and meeting Dates	
	Richard presented the forum's terms of reference, proposed meeting dates, and discussed chair and vice-chair roles. Chair and Vice-Chair Continuity: Jo Stoaling and George Samios agreed to continue as chair and vice-chair, with forum members expressing support and no alternative nominations. Meeting Format and Dates: The forum agreed to continue meeting online for convenience, and accepted proposed dates for the next academic year, with adjustments to accommodate member availability. Membership Gaps: Richard noted that the only outstanding membership gap is for a 14 –19 representative and invited suggestions for suitable candidates.	
10.	A.O.B	
	All forum members acknowledged Richard Morgan's long-standing service as Education Business Manager and lead officer for the Schools Forum, marking his final meeting and reflecting on his contributions since establishing the forum in 2002.	
9.	Date of next meeting	

	7th July 2026	
	Actions – • SEND Reform Plan Workshops: Organise and communicate upcoming workshops for Schools Forum members to participate in the co-production of the SEND reform plan before the mid-May draft deadline. – AW	