Bath & North East Somerset Council

Improving People's Lives

Meeting	Schools Forum
Date	7th 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 with a special welcome and introduction to Emma Whitehead – taking over from RM as SF Lead. EW works for B&NES two days a week and for N. Somerset the rest of the time	
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**	
	EW provided an update on the Dedicated Schools Grant (DSG) deficit for 2025-26, explaining the current status and the lack of information for 2026-27. EW 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 KB's question, EW 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. KB inquired about monitoring trends in DSG over time, and EW 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**	
	EW 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 BaNES. KB requested that the minutes reflect the limited context provided by the figures, emphasising that without understanding the reasons behind the balances, the data is of limited use, and JS agreed to note this. AW 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. EW 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 BaNES current approach. GS 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**	
	CW reported that the SEND reform plan was submitted on time (by 19th June), following extensive workshops and collaboration with partners ensuring broad input into the plan's development. CW confirmed that the plan has now been published on the B&NES website 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. We still don't know what will happen with any deficit accumulated between 2026 and 2028. The plan's implementation will involve forming a core transformation team comprising local authority staff, health colleagues, trust representatives, and other stakeholders, with funding allocated for transformation and opportunities for additional trust involvement. CW wants to develop a local authority model that will lead to very different ways of how health, social care and schools work together with significant changes in practice and culture. 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 Schools Forum, and ongoing monitoring by the DfE is expected. In response to GS Christopher clarified that the new primary AP at the Abbott Alphege 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 partner involvement.	

	KB wished to record thanks in the minutes to CW and all those involved with the submission of the SEND Reform Plan in such a very tight timescale amidst the Ofsted Inspection of SEND	
7.	**A.O.B**	
	Top up Funding for Early Years: • EW informed the forum of a recent decision, agreed with Nick Fortt, to apply the uplift for top-up funding to early years settings. This will equalise support across all settings and have a less than £20,000 impact. All members agreed with EW's proposal. **EHCP Funding** • GS 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 • LD explained that the decision to use banding was made in 2018, and changing to a Section F-based system would require re-banding existing EHCPs - a resource-intensive process with substantial operational and financial implications. • The current scheme was reviewed recently in April 2026 by Schools' Forum. • AW pointed out that the pot of money will remain the same, it will just be 'reallocated' • LD 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 LD offering to scrutinise all exceptional cases and report back on opportunities to redistribute resources within the existing system. • JS asked whether the high needs working group will continue into next year. LD confirmed that the high needs working group will continue into the next year, with GS volunteering to represent maintained primary head teachers on the group.	
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 B&NES Schools Forum. (EW) • **Early Years Top-Up Funding Uplift:** Apply the agreed uplift for top-up funding to early years settings in B&NES and inform Schools Forum of the change. (EW) • **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. (LD)	

	• **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. (LD) • **Standardisation of Provision Map Cost Training:** Reschedule and communicate the training session on standardising costs for provision maps to all relevant schools, aiming for an October half-term launch. (LD) **Next meeting: 13th October 2026**	