

Schools Forum

Date: Thursday 12 March 2026

Time: 4.30pm

Location: Teams

Chair: Pippa Osborne

Members of the Committee

Pippa Osborne (Chair)

Julia Anwar

Dave Farr

Nicky Edwards

Paul Evry

Dave Farr

Kim Garland

Florence Hiatt

David Jenkins

Nicola Jones

Jonathan Keohane

Ruth Laing

Louise Leader

Tania Craig (Deputy Chair)

Ross Newman

Elly Owen

Will Roberts

Fr. Malcolm Strange

Andy Watson

Susie Weaver

David Williams

Sue Wright

Appropriate Officers attending:

Mustafa Salih

Hilary Smith

Caroline Warren

Michelle Palmer

Deb Luter

Councillors attending:

Ian Boulton

Chris Sivers, Executive Director for the Department for People, Badminton Road Offices, Yate,
South Gloucestershire, BS37 5AF

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Agenda

1. WELCOME AND INTRODUCTIONS
2. APOLOGIES FOR ABSENCE (Pippa Osborne)
3. DECLARATIONS OF INTEREST (Pippa Osborne)
4. ANY OTHER ITEMS THE CHAIR DECIDES ARE URGENT (Pippa Osborne)
5. MINUTES FROM 15TH JANUARY MEETING (Pippa Osborne)
6. SEND REFORM (Financial elements) – Verbal (Mustafa Salih)
7. SEND REFORM PLAN – Verbal (Hilary Smith)
8. Q3 DSG REPORT 2025-26 – Report (Caroline Warren)
9. GROWTH FUNDING & FALLING ROLLS UPDATE – Verbal (Caroline Warren)
10. SCHOOLS FORUM FORWARD PLAN
11. ANY OTHER BUSINESS:
 - a. Proposed SF dates 2026-2027 (Pippa Osborne and all)
 - b. Role of Chair (Pippa Osborne)

South Gloucestershire Schools Forum

Minutes of Meeting held on 15 January 2026

Location: Cadbury Heath Primary School

Chair: Pippa Osborne

Forum Members

Pippa Osborne (Chair)	Headteacher Christ Church Junior School
Tania Craig (Deputy Chair)	Executive Head Teacher, New Horizons Learning Centre
Julia Anwar	Head of Business Operations, Olympus Academy Trust
Nicky Edwards	Early Years representative
Paul Evry	Chief Finance Officer, Mosaic Partnership
Kim Garland	Headteacher, Brimsham Green Secondary School
David Jenkins	Governor, Crossways Schools
Jonathan Keohane	Headteacher Callicroft Primary School/Olympus School
Ruth Laing	Early Years, Leaf Trust (King's Forest Primary)
Louise Leader	Headteacher, Pathways Learning Centre
Ross Newman	CEO of the Leaf Trust representing Academies
Elly Owen	District and Branch Secretary – South Gloucestershire NEU
Will Roberts	Chief Executive, CSET
Fr. Malcolm Strange	Rector of The Fromeside Benefice
David Williams	Diocese of Gloucester

Executive Councillors:

Ian Boulton, Cabinet Member - Schools, Skills, Employment and Business

Officers:

Mustafa Salih, Service Director Resources and Business

Caroline Warren, Finance Business Partner

Deb Luter, Senior Accountant - People (Children)

Jo Briscombe, Strategic Lead School Support & Early Years

Claire Paines, Schools Finance Officer

Michelle Palmer, Accountant - People (Children)

Others: Madeleine Roberts, Director of Finance, Enable Trust (replacing Tamsin Moreton, who was the substitute special academy member)

Apologies for absence

Chris Sivers, Dave Farr, Flo Hiatt, Andy Watson, Susie Weaver, Sue Wright, Michelle Trigg

1. **Declarations of Interest – None**
2. **Any Other Items the Chair decides are urgent – None**
3. **Minutes of last meeting – 04th December 2026**

Minutes of the meeting were approved as an accurate record.

4. **Q2 Financial Monitoring Report 2025-206 (Caroline Warren)**

To update Schools Forum on the Dedicated Schools Grant and Safety Valve position as at Quarter 2 2025/26.

The net DSG budget (as at July 2025) excluding academies and High Needs recoupment, was £174,462k. The DSG is forecasting an outturn overspend position of £57,132k, an improvement of £329k since Quarter 1. This arises from a forecast in-year overspend of £18,217k, a forecast Safety Valve payment relating to the DSG recovery I

Schools Block

The Schools Block is forecasting a breakeven position for Quarter 2, no change since Quarter 1.

The Central Schools Services Block is forecasting an underspend of £11k for Quarter 2, no change since Quarter 1.

Early Years Block

The Early Years Block is forecasting a breakeven position for Quarter 2, no change since Quarter 1.

The High Needs Block is forecasting a £20,228k overspend as at Quarter 2 before applying the £2,000k DSG safety valve payment and the underspend being reported within the Central Block (£11k).

The High Needs Block is forecasting a £20,228k overspend as at Quarter 2 before applying the £2,000k DSG safety valve payment and the underspend being reported within the Central Block (£11k). This represents an increase of £11,779k above the latest safety valve target for 2024/2025, which is an improvement of £329k since Quarter 1. This is primarily due to an updated funding forecast following the annual import/export exercise. The DfE has confirmed that we will receive an additional £390k as a result. We have recently submitted an updated version to the DfE with all these additional pressures. We are still receiving payments, which is positive news for the Council and they are still honouring these payments.

5. Schools in Financial Difficulty (Presenter: Mustafa Salih on behalf of Deb Luter)

Current Position (Maintained Schools Only)

- **29 maintained schools** forecast in deficit for 24/25.
- Significant increase driven by **poor 2024/25 funding settlement**.

Support & Intervention

- **18 schools** have undergone SRMA reviews; 3 more planned. This is when we ask the DfE commissioned advisors to go into those schools and look at their budget to see if they can use their funding more efficiently.
- Common issues: low pupil numbers, inability to run full 30-pupil classes, staffing inefficiencies.
- Six schools planning **PAN reductions** or structural changes to improve efficiency.

Key Assurances

- All schools have a credible route to recovery, though some over longer periods.
- LA may extend deficit recovery periods beyond the usual three years.

Wider Discussion

- MATs able to pool resources and smooth deficits; maintained schools lack this flexibility.
- Falling rolls remain a significant factor—birth rates decreasing.
- Importance of early financial support, cluster working, and leadership capacity noted.

Action: Presentation forwarded to the Forum – completed.

6. Early Years Funding 2026-2027 (Jo Briscoombe)

The purpose of this report is to share the outcomes of the recent consultation with the early years sector on the proposals for the Early Years Funding Formula for 2026/2027.

The final consultation was circulated to all settings and childminders. The sector were given 3 options and were asked to select their preferred option.

	Rates for 2025 for comparison	Option 1
Pass through	96.7%	97%
Description of option		Inclusion 1.5% and Deprivation 0.6% £0.15p childminder flexibility allowance all year groups
9-month-old rate	£10.83	£11.33
2-year-old rates for from	£7.95	£8.39
Deprivation supplement	0.6%	0.6%
Inclusion supplement	1.3%	1.5%
Flexibility supplement for childminders	£0.14	£0.15
Early years pupil premium	£1.00 per hour	£1.15p per hour
Disability access fund	£938 per child	£975 per child

- **Option 1** was chosen by **51%** of respondents.
- Strong support for:
 - **Deprivation** supplement
 - Increased **SEND Inclusion Fund**
 - Retention of **childminder flexibility supplement**

Provider Feedback

- Concerns about 3–4-year-old hourly rate being too low.
- Desire for clarity around charging and new funding rules.
- Positive feedback about LA support through a challenging transition year.

Recommendation:

It is recommended that the Schools Forum note the outcome of the consultation and approve implementation of proposals put forward under Option 1, summarised below

- a. 9 months to 2-year-old funding rate is set at £11.33
- b. 2-year-old funding rate is set at £8.39

- c. 3- to 4-year-old funding rate is set at £6.07
- d. Deprivation supplement is set at 0.6% and inclusion fund supplement is set at 1.5%
- e. A flexibility supplement for childminders is set at £0.15.

Decision:

Schools Forum unanimously approved Option 1.

7. Setting the School Budget 2026 – 2027 (Presenter: Mustafa Salih)

The purpose of this report is to formally consult with the Schools Forum on options for setting the Schools Budget 2026-27. The Forum is being asked to give a formal view on a block transfer of up to £3m, which will be presented to Cabinet and Full Council in February 2026 for their consideration in setting the final Schools Budget for 2026-27.

We are consulting the Forum on the following 2 main recommendations:

1. £2.2m transfer from the Schools Block to the High Needs Block and the resulting Formula Funding rates.
2. Uplift on all Top-Up rates by 3%: for mainstream, resources bases, special schools and early-years top-up rates (we are now more in line with many other LAs and need to try and keep pace with inflationary pressures)

The Importance of a £2.2m Block Transfer:

1. Ensures really important support for SEND pupils continues e.g. clusters, Early Years, Early help/prevention. The vast majority of this support goes directly back to schools.
2. The Council continues to adhere to our Safety Valve agreement and does not put at risk the £25.5m DfE Safety Valve funding.
3. Ensures we meet the Government's requirement of continuing to work on reducing deficits.
4. Reduces the risk of any funding impact from the DfE for LAs that can't demonstrate they are doing all they can to reduce their deficits.

Please be aware that any decision made in this Forum is noted and shared with Cabinet and Cabinets are able to override that.

Decision

Unanimous approval by Forum members:

- Full transfer of £2.2m from School funding to SEND funding.
- 3% top-up uplift.

Action: LA Finance to share updated top-up band rates with all schools and trusts (requested by Paul Evry).

8. Current LA Plans for Commissioned Specialist Places 2025 – 2026 and future years (Presenter: Hilary Smith)

Current Provision & Trends

- Increased specialist places across most settings between 25/26 and 26/27.
- New Horizons accepting additional pupils prior to formal expansion.
- Two Bridges increasing capacity as a new school grows.

Resource Bases

- Mostly stable year-to-year; small increases at Charborough Road and Abbeywood.

Planned expansions for 27/28 include:

- New Horizons (40 additional places)
- Lyde Green ASD Centre age-range extension (20 places)
- New resource bases at Tyndale Primary (10 places), Coniston Primary (10 places), Mangotsfield Secondary (20 places)
- Development of Post-16 AP provision (currently a gap) - offer of 20 places.

Discussion

- Continue to support improved identification of SEMH; more SEMH-designated bases may be needed.
- Several places at New Horizons currently filled by Bristol pupils—admission processes to be reviewed.
- We await the SEND Reforms from the DfE.

Action: Presentation forwarded to the Forum – completed.

9. Forward Plan

Noted key items for upcoming meetings include:

- **Growth Funding Policy**
- **Falling Rolls Policy**

March meeting to remain **online**; future format (hybrid vs in-person) to be discussed at that meeting.

10. Any Other Business

- DfE has requested all LAs complete a SEND Maturity Assessment.
- Will require involvement from: Schools Forum members, clusters, ICB, SEND services, LA officers.

The Chair thanked all members and the Leaf Trust for hosting.

Meeting Closed

Next Meeting

Date: 12 March 2026

Venue: Online

South Gloucestershire Council

Schools Forum

12 March 2026

SEND REFORM (FINANCIAL ELEMENTS) – (VERBAL)

South Gloucestershire Council

Schools Forum

12 March 2026

SEND REFORM PLAN (VERBAL)

South Gloucestershire Council

Schools Forum

12 March 2026

Dedicated Schools Grant 2025/26 Quarter 3

Purpose of Report

1. To update Schools Forum on the Dedicated Schools Grant and Safety Valve position as at Quarter 3 2025/26.

Dedicated Schools Grant (DSG) Funded budgets

2. The net DSG budget (as at November 2025) excluding academies and High Needs recoupment, is £179,233k. The DSG is forecasting an outturn overspend position of £57,083k, an improvement of £49k since Quarter 2. This arises from a forecast in-year overspend of £18,217k, a forecast Safety Valve payment relating to the DSG recovery plan (£2,000k) and a brought forward deficit balance of £38,915k.

3. Details of the DSG funding announcement including adjustments for Academy Conversions (Recoupment), High Needs and Early Years Block Adjustments are provided in table 1 below.

Table 1 – DSG Funding Announcement

DSG Budget	Net £'000
Revised Allocation (July 2025)	174,462
Adjustments and Recoupment	
• High Needs Block – Import / Export Adjustments	390
• Early Years Block – updated Summer Term 2025 Funding for 9mths to 2 year olds – Summer Term Count	4,017
• Early Years Block – updated Summer Term 2025 Funding for 2 year old working parents – Summer Term Count	322
• Early Years Block – updated Summer Term 2025 Pupil Premium Funding for above categories	42
Total Revised DSG (November 2025)	179,233

4. The Dedicated Schools Grant (DSG) is divided into four funding blocks: Schools Block, Central Schools Services Block, High Needs Block, and Early Years Block.

5. The forecast under / over spend position for each funding block is provided in table 2 below (see column highlighted green) and the key changes and risks in the subsequent paragraphs.

Table 2 – Funding position by Blocks

Funding by Blocks	Gross Budget	EFA / Other Income Budget	Budget Reserve (Usuable Approved Q2)	Net Budget (DSG)	Gross Exp	EFA / Other Income	Q3 Unusable Reserve (In Year DSG)	Net Exp	Over / (Under)
	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s	£'000s
Schools Block:									
Total Schools Block - Primary & Secondary Schools (excluding Academies)	79,354	-8,020	0	71,334	81,042	-9,858	150	71,334	0
Central Schools Services Block:									
Total Central Schools Services Block	3,677	-166	11	3,522	3,651	-142	13	3,522	0
High Needs Block:									
Schools & Independent Providers (including Academies)	67,568	-298	-20,182	47,088	68,104	-711	-20,305	47,088	0
Central Items	2,125	-260	-46	1,819	2,161	-316	-26	1,819	0
Total High Needs Block	69,693	-558	-20,228	48,907	70,265	-1,027	-20,331	48,907	0
Early Years Block:									
Private, Voluntary & Independent Providers	54,098	0	0	54,098	54,193	-95	0	54,098	0
Central Items	1,596	-224	0	1,372	2,120	-748	0	1,372	0
Total Early Years Block	55,694	-224	0	55,470	56,313	-843	0	55,470	0
Total In-Year DSG & EFA Funding	208,418	-8,968	-20,217	179,233	211,271	-11,870	-20,168	179,233	0

Total DSG In Year Overspend	-20,168
DSG Deficit Reserve B/F	-38,915
DSG Safety Valve Agreement 2025-2026 (DfE Contribution £2,000k)	2,000
Total DSG Deficit Reserve	-57,083

DSG Reserve:	£'000s
DSG Deficit Reserve B/F from previous years (Unusable Reserve)	-38,915
Approved Budget 2025/26	-8,438
DSG Safety Valve Agreement 2025-2026 (DfE Contribution £2,000k)	2,000
Request increase draw on DSG Reserve at Quarter 1 (£12,108k)	-12,108
Request reduce drawdown on DSG Reserve at Quarter 2 (£329k)	329
Request reduce drawdown on DSG Reserve at Quarter 3 (£49k)	49
Total DSG Deficit Reserve (Unusable Reserve)	-57,083

Schools Block

6. The Schools Block is forecasting an underspend of £150k for Quarter 3, an improvement of £150k since Quarter 2. This is due to an updated forecast based on the latest claims relating to growth funding, falling rolls and surplus places. The forecast includes a contingency provision of £79k for any exceptional funding requests or future claims.

Central Schools Services Block

7. The Central Schools Services Block is forecasting an underspend of £13k for Quarter 3, an improvement of £2k since Quarter 2.

Early Years Block

8. The Early Years Block is currently forecasting breakeven position for Quarter 3, no change since Quarter 2. It should be noted that the final funding allocation for the Early Years block cannot be determined until the January 2026 census has been completed. In addition, we are expecting an updated funding announcement based on the Autumn Term head count for the new entitlements within Early Years (2 year old working parents and for children aged 9mths to 2 years). At present, we do not anticipate any significant variations between our forecast outturn and the expected grant income, however the actual position will be known later in the financial year and the outcome of updated funding announcements and expenditure will be reported to Schools Forum in the outturn report. This also relies upon Early Years settings submitting accurate and timely data for the various data returns.

High Needs Block vs Safety Valve

9. The High Needs Block is forecasting an overspend of £20,331k as at Quarter 3, an increase of £103k since Quarter 2 within the High Needs Block.

10. After applying the £2,000k DSG safety valve payment and the underspends being reported within the Schools Block and Central Schools Services Block (£163k), the overspend represents an increase of £11,730k above the latest safety valve target for 2024/2025, which is an improvement within the total DSG of £49k since Quarter 2.

11. As previously reported, the latest Safety Valve model for 2025/26 was developed using November 2023 assumptions, with an inflationary uplift applied for 2025/26 prices. Our plan has since been updated and submitted to the DfE to reflect rising demand and cost pressures on the council in future years. Earlier forecasts anticipated a reduction in EHCPs within Early Years and Primary settings due to the introduction of the Early Years Inclusion Fund, as well as fewer placements in Independent and Non-Maintained schools, OLA Special Schools, and Resource Bases because of increased local provision. However, actual figures show significant variances, as both demand and costs remain challenging for the Local Authority

12. The main pressure areas compared to the approved 2025/26 Safety Valve targets relate to High Needs Support in Primary and Secondary schools (£2,365k), South Gloucestershire Special School Placements (£638k), OLA Special Schools and Resource Base placements (£1,484k), Independent Placements (£4,884k) and Post 16 (£3,058k). These pressures have been partially offset against improvements across South Gloucestershire Resource Bases (£251k) and other DSG areas including updated funding changes (£448k).

13. The High Needs Block has seen an increase of £103k since Quarter 2. The key pressures relate to demand and/or price changes as illustrated in Table 3 and detailed below.

14. High Needs Support in Primary and Secondary schools is reporting an additional pressure of £2,365k compared to the Safety Valve, an increase of £35k since Quarter 2. This is due to an increase in the average weekly price of £10 per week, which has been partially mitigated by a reduction in demand of 10 Education, Health and Care Plans compared to Quarter 2.
15. South Gloucestershire Special Schools is showing an additional pressure of £638k, an improvement of £75k since Quarter 2. This is due to a reduction in 7 placements, which has been partially mitigated by an increase in the average weekly price of £3 per week.
16. OLA Special Schools and Resource Bases are reporting an additional pressure of £1,484k compared to the safety valve, an improvement of £163k since Quarter 2. This is due to a reduction in the average weekly price of £37k per week, primarily due to a mover out and a ceased plan. Overall, there has been a net increase of 1 placement since Quarter 2.
17. Independent and Non-Maintained Special Schools is reporting an additional pressure of £4,884k compared to the safety valve, an increase of £214k since Quarter 2. This relates to an increase in the average weekly price of £32 per week, largely due to inflationary uplifts and higher costs of new placements compared to the cost of leavers since Quarter 2.
18. Post 16 Education is showing an additional pressure of £3,058k compared to the safety valve, an increase of £86k since Quarter 2. This is due to an increase of 33 placements, which has been partially mitigated by a reduction in the average weekly price of £22 per week since Quarter 2.
19. Other DSG areas are reporting underspends of £701k compared to the safety valve, a reduced underspend position of £6k since Quarter 2.
20. It should be noted that the Quarter 3 figures include a contingency provision for new placements based on named and unknown placements therefore as the year progresses these will be updated with actuals and reported to Schools Forum.

Table 3 – High Needs Demand and Price

High Needs Pressure areas	Outturn 2022/23	Outturn 2023/24	Outturn 2024/25	Quarter 1 2025/26	Quarter 2 2025/26	Quarter 3 2025/26
Independent and Non-Maintained Special Schools - Placements No.s	122	130	144	167	176	176
Average Weekly Price (38 wks)	£1,614	£1,809	£1,747	£2,022	£2,000	£2,032
Statemented Support Provision including SG Pupils in OLA Schools No.	963	1,201	1,431	1,587	1,658	1,648
Average Weekly Price (38 wks)	£269	£236	£228	£213	£208	£218
Post 16 - FE Independent Specialist Placements	28	37	43	50	48	49
Average Weekly Price (38 wks)	£1,302	£1,037	£1,257	£1,431	£1,509	£1,481
Post 16 - FE Colleges	295	298	315	311	332	364
Average Weekly Price (38 wks)	£184	£198	£163	£220	£182	£177
Post 16 Alternative Provision	57	143	164	215	199	199
Average Weekly Price (38 wks)	£558	£433	£615	£706	£700	£690
Post 16 - Total Placements	380	478	522	576	579	612
Average Weekly Price (38 wks)	£322	£358	£395	£505	£470	£448
Education other than at School SENHN No.s	13	19	24	20	27	29
Average Weekly Price (38 wks)	£515	£521	£580	£866	£692	£622
Other Alternative Provision SENAP No.s	50	33	26	30	28	30
Average Weekly Price (38 wks)	£366	£630	£1,207	£1,291	£1,393	£1,351
OLA Special Schools No.s	104	109	138	150	138	139
Average Weekly Price (38 wks)	£606	£611	£637	£762	£818	£781
Early Years High Needs Support No.s (EHCPs only)	23	30	43	30	30	
Average Weekly Price (38 wks)	£201	£170	£174	£274	£213	
Special Schools No.s	517	557	624	684	683	676
Average Weekly Price (38 wks)	£577	£616	£618	£615	£621	£624
Resource Bases No.s	145	154	142	138	135	135
Average Weekly Price (38 wks)	£583	£471	£497	£408	£426	£424
PLC No.s	170	170	170	138	130	130
Average Weekly Price (38 wks)	£622	£603	£597	£601	£429	£429

* during 2021/22 Alternative provision costs for Children in School monitored separately.

Safety Valve Message - Quarter 3 Cabinet Report

21. The council has a Safety Valve agreement with the Department for Education (DfE), which originally intended to achieve an in-year balance between the level of funding High Needs funding received each year and high needs expenditure. However, it has become clear that the Safety Valve programme is not delivering on that aim for any local authority, as expenditure continues to increase with increasing demand for support and provision for SEND and control of that demand is beyond what can reasonably be expected of a local authority.

22. In 2024 the Local Government Association and County Councils Network commissioned Isos Partnership to review the SEN system and key findings which support the challenges local authorities in England are currently facing include:

- Since the 2014 reform of the SEND system, EHCPs has risen from 240,183 in 2015 to 575,973 in 2024, an increase of 140%.
- A further 1.2 million children in schools are identified as requiring SEN support, up from 990,000 in 2015.
- Rising costs on SEND outweighs the funding increases.
- Demand is growing faster than capacity can be added.

23. Consequently, local authorities have called for urgent SEND reforms. The SEND White Paper, originally planned for Autumn 2025, has been delayed until early 2026. However, it has been announced that from 2028/29, the Government plans to centrally fund the full cost of SEND provision, removing this responsibility from local authorities. Whilst we welcome the news, the Government has not confirmed how it will address the current DSG deficits.

24. In the meantime, we will continue to monitor progress under the safety valve agreement and provide assurance that action is being taken to address inefficiencies within the system and that controls on expenditure are being implemented by officers as much as is reasonably possible.

25. As previously reported, there continues to be an increase in demand for Education, Health and Care Plans (EHCPs) both locally and nationally, alongside rising costs associated with delivering the support identified in these plans. Whilst the growth in EHC Plans within South Gloucestershire has increased, we are in line with other Local authorities within the South West.

26. It is also worth noting a shift in the timing of requests for EHC needs assessment, influenced by the introduction of the Early Years Inclusion Support Fund. This enables support for children in early years without requiring an EHCP, meaning requests for assessments are now more likely to occur when the child is older. The majority of requests are currently coming forward for children in Years 4 to 7.

27. A priority area of focus is the creation of additional specialist provision in the state funded maintained special school sector to reduce the requirement for some placements in

the expensive independent special school sector. Plans have been developed and are being implemented, and these include completion of expansion of Warmley Park, expansion of Pegasus, opening of Two Bridges Special Free school (October 2024). Plans still to be delivered are the expansion of New Horizons Special school and new Resource Bases in mainstream schools which we aim to complete during the 2026/27 academic year.

28. Another significant increase in expenditure relates to provision for young people with SEND post-16. Given the lack of suitable mainstream specialist provision, there has been greater reliance on high-cost Alternative Provision, which also includes a limited offer for some very complex children and young people. This is also reflecting a wider national challenge.

29. Key to the mitigation locally has been the work undertaken between officers and local education system representative as members of the High Needs Working Group, a sub-group of Schools Forum which includes a comprehensive programme of workstreams designed to improve efficiency and effectiveness of local arrangements for SEND and is delivering financial benefits wherever possible.

Author

Caroline Warren, Finance Business Partner

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South Gloucestershire Council

Schools Forum

12 March 2026

GROWTH FUNDING & FALLING ROLLS UPDATE (VERBAL)

SCHOOLS FORUM FORWARD PLAN

March 2026	12	Microsoft Teams	
		SEND Reform (Financial elements)	Mustafa Salih
		SEND Reform Plan	Hilary Smith
		Q3 DSG report	Caroline Warren
		Growth Funding & Falling Rolls Update	Caroline Warren

May 2026	7	Microsoft Teams	
		Safety Valve update	Mustafa Salih
		High Needs Working Group Update (HNWG)	Susie Weaver
		Mainstream Place Numbers update (Verbal)	Hilary Smith
		Place Pressures (deferred from March)	Mike Wheeler
		Growth Funding and Falling Rolls Policy	Caroline Warren
		Scrutiny report	?

July 2026	2	Microsoft Teams	
		Schools in Financial Difficulty Update (Report) (Maintained Schools & Academies update)	Mustafa Salih
		Funding Update (including School's supplementary grant)	Mustafa Salih
		Outturn Report 2024-2025 verbal update outturn report)	Mustafa Salih
		Financial Regulations for Schools	Justine Poulton
		Scheme for Financing Schools – DfE Directed Changes	Caroline Warren
		High Needs Working Group Update	Susie Weaver

Any other business

Proposed Schools Forum dates 2026-2027 and Role of Chair

Schools Forum Dates – 2026 (already scheduled)

Schools Forum		Pre-Meets	
15 January	4.30pm (FTF)	7 January	4pm – 4.30pm
12 March	4.30pm	25 February	4pm – 4.30pm
7 May	4.30pm	22 April	4pm – 4.30pm
2 July	4.30pm	17 June	4pm – 4.30pm
24 September	4.30pm	9 September	4pm – 4.30pm
5 November	4.30pm	15 October	4pm – 4.30pm
3 December	4.30pm	18 November	4pm – 4.30pm

Provisional Dates – 2027 (not yet scheduled in diaries)

Schools Forum		Pre-Meets	
14 January	4.30pm	Wed 6 January	4pm – 4.30pm
11 March	4.30pm	Wed 24 February	4pm – 4.30pm
6 May	4.30pm	Wed 21 April	4pm – 4.30pm
1 July	4.30pm	Wed 16 June	4pm – 4.30pm
23 September	4.30pm	Wed 8 September	4pm – 4.30pm
4 November	4.30pm	Wed 20 October	4pm – 4.30pm
2 December	4.30pm	Wed 17 November	4pm – 4.30pm