

## Schools Forum

Date: Thursday 2 July 2026

Time: 4.30pm

Location: Marlwood School, Vattingstone Lane, Alveston, South Glos, BS35 3LA

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

Telephone: (01454) 863253

Enquiries to: Mustafa Salih, Service Director, Resources and Business; Telephone (01454)  
862548 or E-mail [mustafa.salih@southglos.gov.uk](mailto:mustafa.salih@southglos.gov.uk)

## Public Rights to Information and Attendance at Meetings

### *YOU HAVE A RIGHT TO:*

- Attend all Council, Committee and Sub-Committee meetings unless the business to be dealt with would disclose 'confidential' or 'exempt' information.
  - Inspect agendas and public reports five days before the date of the meeting.
  - Inspect agendas, reports and minutes of the Council and all Committees and Sub-Committees for up to six years following a meeting.
- Inspect background papers used to prepare public reports for a period of up to four years from the date of the meeting. (A list of background papers to a report is given at the end of each report). A background paper is a document on which the officer has relied in writing the report.
- Have access to the public register of names, addresses and wards of all Councillors with details of the membership of all Committees and Sub-Committees.
- Have a reasonable number of copies of agendas and reports (relating to items to be considered in public) made available to the public attending meetings of the Council, Committees and Sub-Committees.
- Have access to a list setting out the decision-making powers the Council has delegated to their officers and the title of those officers.
- Copy any of the documents mentioned above to which you have a right of access. There is a charge of 15p for each side of A4, subject to a minimum charge of £4.
- For further information about this agenda or how the Council works please contact Mustafa Salih (01454) 862548 or e-mail [mustafa.salih@southglos.gov.uk](mailto:mustafa.salih@southglos.gov.uk)
- Also see our website [www.southglos.gov.uk](http://www.southglos.gov.uk)

---

## EMERGENCY EVACUATION PROCEDURE

In the event of a fire alarm, fire drill or other emergency, signalled by a continuously ringing bell, please leave from the room via the signs marked "Exit".

---

## OTHER LANGUAGES AND FORMATS

**This information can be made available in other languages, in large print, Braille or on audio tape. Please phone (01454) 868686 if you need any of these or any other help to access Council services.**

# 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 07TH MAY MEETING (Pippa Osborne)
6. SCHOOLS IN FINANCIAL DIFFICULTY UPDATE (for information) (Report) (Mustafa Salih)
7. SEND REFORM UPDATE:
  - a. GENERAL SEND REFORM PLAN (Verbal) (Hilary Smith)
  - b. SEND REFORM PLAN FUNDING (Verbal) (Mustafa Salih)
8. SCHEME FOR FINANCING SCHOOLS – DFE DIRECTED CHANGES (Report) (Caroline Warren)
9. HIGH NEEDS WORKING GROUP – STRUCTURE OF WORKSTREAMS GOING FORWARD (Verbal) (Mustafa Salih)
10. SCHOOLS FORUM FORWARD PLAN
11. ANY OTHER BUSINESS:
  - a. Confirmation of venue for 02<sup>nd</sup> July (Pippa Osborne)
  - b. Future in-person and Teams meetings (Pippa Osborne/Mustafa Salih)
  - c. Voting in new Chair of the Forum (All)

# South Gloucestershire Schools Forum

## Minutes of Meeting held on 07<sup>th</sup> May 2026

Location: Teams

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                 | Chief Operating Officer, Olympus Academy Trust            |
| Nicky Edwards               | Early Years representative                                |
| Paul Evry                   | Chief Finance Officer, Mosaic Partnership                 |
| Dave Farr                   | Finance Manager, Leaf Trust                               |
| Kim Garland                 | Headteacher, Brimsham Green Secondary School              |
| Florence Hiatt              | Head of Additional Learning Support, SGSC                 |
| David Jenkins               | Governor, Crossways Schools                               |
| Jonathan Keohane            | Headteacher Callicroft Primary School/Olympus School      |
| Ruth Laing                  | Head of Early Years and Community                         |
| Louise Leader               | Special Academy Representative                            |
| 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         | Mosaic Chaplaincy Lead                                    |
| Daniel Walton               | Pathways AP Headteacher Representative                    |
| Susie Weaver                | Executive Director, Cabot Learning Federation             |
| David Williams              | Diocese of Gloucester                                     |
| Sue Wright                  | Finance Director CSET                                     |
| Madeleine Roberts (Reserve) | Director of Finance, Enable Trust                         |

### 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)  
 Claire Paines, Schools Finance Officer  
 Mike Wheeler, Strategic Lead for Statutory Education

### Guests:

## **APOLOGIES FOR ABSENCE**

Chris Sivers, Tania Craig, Ross Newman. David Williams. Madeleine Roberts, Fr. Malcolm Strange (unable to access link)

- 1. Declarations of Interest – None**
- 2. Any Other Items the Chair decides are urgent – None**
- 3. Minutes of last meeting – 12<sup>th</sup> March 2026**

Minutes of the meeting were approved as an accurate record.

## **Key Highlights**

The Chair reminded colleagues that the longstanding agenda item on the Safety Valve update has now concluded. As a result, it has been renamed **SEND Reform and Funding**. Mustafa will continue to provide updates at each meeting, ensuring colleagues are kept informed of any developments as they arise.

### **1. SEND Reform and Funding (Mustafa Salih)**

A DSG stabilisation grant of approximately £50m is anticipated, subject to approval of the SEND plan, leaving an estimated £7m deficit by the end of 2025/26. Timing of payments will depend on the approval stage.

Current unknowns include what is going to happen to the funding for High Needs during 27-28 and 28-29. The DfE have accepted that authorities will continue to generate overspends for those two years but we don't know how they are going to support that part of a growing deficit.

We are making progress on the SEND reform plan. We think we will have a strong submission, so are hopeful to be amongst the first tranche of local authorities that get theirs approved.

There is a Schools Mainstream Inclusion Grant and that will be available and go direct to schools. For maintained schools, it will go via the local authority and that's to support schools to develop their inclusion plans and again I think it's tied to schools producing their own inclusion plans.

The funding for local authorities to start developing the new reform ways of working for 2026-27 have also been announced. We will bring our plans on how we are going to utilise that funding to the Schools Forum once it's more evolved. These are all very new allocations and we haven't had a lot of time to plan effectively for their use.

The third tranche of funding is a capital allocation that allows us to start developing the inclusion bases in mainstream schools that are part of the SEND Reform Plan and we would like some views on how we progress with this capital allocation. That seems to be the more immediate bit of our funding that we need to start moving forward on.

Summary:

- Schools Inclusion Grant (direct to schools)
- Local authority funding to support new SEND delivery models
- Capital funding of approximately £4.6m (2026–27) for mainstream inclusion provision

The proposed approach is to develop inclusion bases in all secondary schools, alongside equivalent primary places. Investment priorities include physical adaptations, assistive technology, and more flexible SEND provision.

Key points:

- Strong support for collaborative planning with schools
- Requirement for a dedicated working group to progress capital delivery
- Need to ensure educational strategy drives investment
- Consideration of workforce implications and local accessibility

### **Agreed Action**

- Julia Anwar and Will Roberts are willing to be part of a dedicated working group to progress capital delivery.
- Louise Leader is also willing to join the group. She will reach out to colleagues in specialist sectors to identify others who could contribute.
- Ross Newman put forward the name of their Director of Inclusion, Trust Academy to join the group if needed.

**PO** – While MAT CEOs represent many schools (including all secondaries), many maintained primary schools may not yet be aware of recent changes, especially as developments are recent and not fully formalised.

A proposal is made to use an upcoming primary heads meeting on Thursday 18<sup>th</sup> June at 8am and if we could ask Mustafa and Hilary to join at the beginning to:

- Update primary school leaders on recent changes
- Ensure broader awareness across all school types (both MATs and maintained schools)

The “Heads Exec” group is highlighted as a cross-sector forum that includes all types of primary schools, making it a suitable platform for engagement and discussion. There is a

lack of volunteers to lead the Heads Exec group, and an opportunity is suggested to encourage attendees to step forward and be part of a future (likely restructured) group.

Although the Schools Forum provides financial oversight, and existing groups (like the High Needs Working Group) are already very busy, there is a suggestion that a separate group may be needed to manage the workload and focus on emerging priorities (e.g. SEND reforms).

**NE** - There is increased funding available, particularly for:

- Early years provision
- Ordinary inclusion (SEND-related support)

This is viewed as a positive opportunity to improve outcomes.

There were recommendations for aligning Early years funding and capital funding for school-based nurseries. Strong suggestion to embed SEND consideration into capital funding bids and ensure nursery environments are better equipped for SEND children.

**LL** - A separate focus group is considered essential to properly address the topic. Existing groups (e.g., HNWG) already have a very broad scope, making it difficult to give this issue adequate attention. There is a strong emphasis on inviting representation from the school forum sector and ensuring inclusive participation, allowing those interested to contribute time or nominate someone. The model under discussion should be flexible and responsive to changing needs and expert input is essential for successful delivery. The work is complex and requires specialised knowledge.

## **2. Primary and Secondary Place Planning (Mike Wheeler – Presentation)**

### **Primary**

- Overall surplus capacity at 16% (above the 5–10% target range)
- Declining birth rates with uneven demand
- Growth areas include Yate and Thornbury
- Surplus capacity in some rural locations
- Temporary capacity increases required in some areas

### **Secondary**

- Admissions remain broadly stable
- No immediate requirement to reduce PANs
- New Lyde Green secondary provision supporting balance

Future pressures include declining pupil numbers in some areas and ongoing housing growth.

**Action: PowerPoint presentation to be circulated all headteachers.**

### **3. Growth and Falling Rolls Funding (Caroline Warren)**

The report differs slightly from previous versions and seeks Schools Forum approval for policy changes. A £250,000 falling rolls fund is proposed, with all funding aligned to the Age Weighted Pupil Unit (AWPU) rate for consistency.

These changes are forecast to create a £400,000 overspend, and proposals are included to address this. The revisions aim to respond to recent pupil number volatility. As required, policies must be agreed annually by the Schools Forum.

#### **Key policy updates:**

- Align all funding (including surplus places) to the AWPU rate.
- Growth funding criteria remain unchanged, aside from the rate adjustment.
- Falling rolls policy adds a criterion allowing funding where PAN reductions are refused despite temporary falling rolls.
- Removal of criteria relating to school balances and the 80% catchment requirement.

#### **Funding position:**

- 2026–27 allocation: £672,000 (down £317,000).
- No DfE falling rolls funding received; proposal to top-slice £250,000 from the growth budget.
- Forecast overspend based on current demand, with limited contingency.

Growth funding will continue to support agreed PAN increases, infant class compliance, new schools, and surplus place management.

The updated policies clarify purpose, scope, eligibility, and funding arrangements, with only minor changes to falling rolls criteria.

#### **Recommendations**

- Approve the Growth & Surplus Places Policy for 2026–27. **Approved**
- Approve the Falling Rolls Policy and top slice of £250k to fund for 2026–27. **Approved**
- Note and Endorse the Application of AWPU Rates from Apr 2026. **Noted**
- Note the estimated forecast overspend of £400k in 2026–27 and approve the Proposed Recovery Plan for 2027–28. **Noted**
- Note the Worked Examples Provided in the Policies. **Noted**

#### **4. High Needs Working Group (Susie Weaver)**

Activity has been paused to prioritise SEND reform planning and will resume next academic year with updated priorities and terms of reference.

##### **Key themes**

- The discussion focuses on High Needs Working Group activity and SEND reform planning.
- There is strong engagement and support from colleagues to contribute to deeper transformation work beyond formal meetings.

##### **The recent meeting on 4<sup>th</sup> March**

- Covered:
  - Regular updates (e.g. metrics and PLC funding).
  - A major review and revision of key themes following inspection.
- The revised themes:
  - Reflect learning from the SEND inspection.
  - Are designed to be future-focused, aligning with upcoming reforms.
  - Were presented in a clear, visual, accessible format.

##### **Shift in focus and activity**

- Significant activity has taken place between March and May.
- Planned meetings were reduced, with resources deliberately redirected toward:
  - SEND transformation work
  - Preparing for reform planning and implementation
- This was a pragmatic decision to prioritise high-impact work.

##### **Governance and involvement**

- Schools Forum and the High Needs Working Group provide oversight, but:
  - The detailed, in-depth work happens in wider transformation activities.
- The chair has been actively contributing to:
  - Local SEND transformation work
  - Regional collaboration

##### **Next steps**

- Key milestones:
  - Reform readiness and planning (May–June)
  - Final plan sign-off (September)
- Looking ahead:

- A full cycle of working group meetings will resume next academic year.
- Outcomes from the transformation work will be fed back into the group.

## **5. Trade Union Facilities Fund (Claire Paines/Mustafa Salih)**

### **Pooled funding approach (Mustafa Salih)**

Schools contribute to a shared fund used to cover the cost of releasing trade union representatives. This spreads the financial impact across all schools instead of burdening individual ones.

### **Purpose of the fund:**

The arrangement supports schools by ensuring they are not disproportionately affected when staff are released for union duties.

### **Need for oversight:**

Because the fund is made up of contributions from all schools, it is considered important that its use is transparent and properly governed with reporting to the Schools Forum.

### **Role of the Schools Forum:**

The Schools Forum has been identified as the appropriate body to oversee the fund, including:

- Monitoring how the fund is used
- Reviewing the size of the fund
- Considering how any surplus is managed

### **Reason for introducing this now:**

The fund has not previously been presented to the Schools Forum, but it is now being brought forward to ensure appropriate oversight and transparency.

## **Overview of the scheme (Claire Paines)**

- It describes the Trade Union Facilities Pooled Fund Scheme (2026–27).
- The scheme provides funding to schools to cover release time for elected union representatives
- Representatives carry out key duties such as:
  - Attending HR and union meetings
  - Supporting restructures and academy conversions
  - Representing staff in disciplinary, grievance, absence, and capability processes
  - Handling day-to-day casework

## **Value and impact**

- Union reps help resolve issues early and informally, preventing escalation into costly formal procedures.
- They bring both national knowledge and local school context, adding value to schools.

## **Participation**

- **Strong participation overall:**
  - Almost all maintained schools buy into the scheme (only three exceptions).
  - Good engagement from academies across multiple trusts.

## **Allocation method**

- Funds are allocated based on:
  - Union membership levels
  - Hours worked by representatives

## **Key message**

- The scheme is a cost-effective, reliable way for schools to meet statutory obligations.
- Continued participation is important to maintain its viability and benefits for all schools.

Participation remains strong. Further clarification of the arrangements will be addressed on an ongoing basis.

## **6. Other Updates**

- Chair to step down at the end of the academic year; successor to be identified
- Next meeting scheduled for 2 July (in person) at Marlwood School.

Meeting closed

# SOUTH GLOUCESTERSHIRE COUNCIL

## SCHOOLS FORUM

02<sup>nd</sup> July 2026

### Schools in Financial Difficulty – for information

#### 1. Purpose of Report

The purpose of the report is to update on maintained Schools' overall financial balances and those maintained schools facing the most significant financial challenges.

#### 2. Background

2.1 Local authorities have continuing responsibility for financial regularity in schools that they maintain.

2.2 The Council has established the Schools Strategic Finance Group (SSFG), consisting of key senior officers, to identify, review and support schools with financial challenges.

2.3 For comparable purposes, all figures in this report relate to the current number of maintained schools within South Glos which is 53.

#### 3. Schools outturn figures

| 18-19      | 19-20      | 20-21      | 21-22      | 22-23      | 23-24      | 24-25      | 25-26    |
|------------|------------|------------|------------|------------|------------|------------|----------|
| £3,872,616 | £3,789,397 | £6,212,771 | £6,835,444 | £6,048,542 | £4,684,982 | £2,840,416 | £524,152 |

3.1 The final 25-26 position of an aggregate cumulative surplus of £0.524m was a significant improvement on the in-year forecast identified by schools which was a deficit of £0.462m.

#### 4. 25-26 SiFD schools 25-26 outturn

4.1 We categorise schools into 3 areas as follows:

|                     |                                                                                                                                        |    |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------|----|
| Not considered SiFD | Budget submission demonstrates a balanced budget for at least 1 year and with an in-year financial forecast assessed as non-concerning | 22 |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------|----|

|            |                                                                                                     |    |
|------------|-----------------------------------------------------------------------------------------------------|----|
| Category A | Year 1 reflects a balanced position but this is not sustained and no recovery has been demonstrated | 6  |
| Category B | Budget submission shows a continuing deficit, with or without showing financial recovery            | 25 |

4.2 Of the 6 Category A schools, all 6 had final outturns in surplus, 5 of which had a significantly improved position.

4.3 Of the 25 Category B schools, 5 had surplus out-turns, 16 ended with an improved deficit and 4 schools had a worse deficit although for very specific reasons. 16 had received or were in receipt of an SRMA deployment. 12 of these had an improved deficit position at outturn and 1 had a surplus end of year position. The other 3 had very specific reasons for their deficit worsening.

| Category            | Budget balance     | Revised balance    | Outturn balance    |
|---------------------|--------------------|--------------------|--------------------|
| Not considered SiFD | £3,480,873 surplus | £3,304,143 surplus | £3,716,569 surplus |
| A                   | £369,358 surplus   | £379,032 surplus   | £595,172 surplus   |
| B                   | £4,355,583 deficit | £4,144,786 deficit | £3,787,589 deficit |
| TOTAL               | £505,352 deficit   | £461,611 deficit   | £524,152 surplus   |

## 5. 2025-26 SiFD schools 2026-27 budget submissions

5.1 The 6 schools identified as Category A schools in 25-26 are no longer considered SiFD based on their 26-27 budget submissions, which is a welcome outcome.

5.2 Of the 25 schools identified as Category B schools in 25-26, based on their 26-27 budget submissions, 4 are no longer considered SiFD, 4 are now Category A and 17 remain Category B.

5.3 Of the 17 that remain Category B, 8 have a worse deficit position for 2026-27 than anticipated in 2025-26 and 9 have an improved deficit position. Most of the 8 reporting a worse deficit position can cite reducing pupil numbers as the reason.

## 6 2026-27 Budget submissions

| Category            | Number of Schools | 26-27 Budget submission |
|---------------------|-------------------|-------------------------|
| Not considered SiFD | 27                | £3,885,521 surplus      |
| A                   | 6                 | £292,554 surplus        |
| B                   | 20                | £5,849,290 deficit      |

|              |           |                           |
|--------------|-----------|---------------------------|
| <b>TOTAL</b> | <b>53</b> | <b>£1,671,215 deficit</b> |
|--------------|-----------|---------------------------|

6.1 There has been an improvement in the number of schools who are not considered SiFD which in turn has reduced the number of Category B schools by 5 from last year which is also a welcome outcome. However, the cumulative deficit figure for these schools has increased from 25-26, highlighting the financial challenges our schools continue to face.

6.2 The anticipated cumulative outturn balance for schools for 2026–27, based on the 2025–26 budget submissions, was a deficit of £3,502,249. The subsequent improvement of £1.8 million is a significant improvement and reflects the sustained and collaborative efforts of both schools and LA staff in addressing financial pressures in future years.

6.3 The schools identified as Category A will be contacted to ensure they have mitigations in place to address the future years' deficit figures but all are considered manageable.

6.4 We have 3 schools who are category B for the first time – 2 have participated in an SRMA deployment (1 in receipt of final report, 1 in receipt of draft report) and the other will be offered an SRMA visit. All 3 schools have worse than anticipated financial positions due to falling NOR.

6.5 Of the remaining 17, 2 are currently participating in an SRMA deployment, 14 have received their final SRMA report with costed recommendations and 1 will be offered an SRMA deployment.

6.6 We have a series of meetings planned with the Category B schools to continue to support them in their recovery process. We acknowledge and are sympathetic to the challenges faced by all schools in South Glos.

6.7 Changes to surplus places and falling rolls criteria has meant more schools are eligible resulting in additional funding to support with financial recovery. Although as a Local Authority, we do not meet the criteria for Falling Rolls funding from the DfE, within the relevant DfE guidance we are able to support schools through in this way through the use of DSG funding.

Author  
Deb Luter  
Senior Accountant  
People - Children

**SOUTH GLOUCESTERSHIRE COUNCIL**

**SCHOOLS FORUM**

**02<sup>nd</sup> July 2026**

**SEND REFORM UPDATE – GENERAL PLAN AND FUNDING (VERBAL)**

## **SOUTH GLOUCESTERSHIRE COUNCIL**

### **SCHOOLS FORUM**

**02<sup>nd</sup> July 2026**

#### **SCHEME FOR FINANCING SCHOOLS – DfE DIRECTED CHANGES 2026**

##### **1. Purpose of Report**

To inform Schools Forum of the Department for Education (DfE) position on the Scheme for Financing Schools for 2026–2027, and to confirm the impact (if any) on the South Gloucestershire Scheme.

##### **2. Background**

Financial Regulations govern the way the Council controls and manage its financial responsibilities. Under the Schools Standards and Framework Act 1998 legislation local authorities must distribute the individual school's budget amongst their maintained schools using a formula which accords with regulations made by the secretary of state. The financial controls within which delegation works must be set out in a document by South Gloucestershire Council, this document is referred to as the Scheme for Financing of Schools ("the scheme"). This scheme sets out the financial relationship between the Authority and the schools maintained by the Authority. The scheme contains requirements relating to financial management which are binding on both the local authority and the governing bodies of schools. This includes a requirement for local authority funded schools to comply with the specified financial regulations for schools.

Financial regulations apply to every member of the governing body and member of staff at local authority-maintained schools including contractors and temporary staff engaged to carry out duties relevant to the financial management and administration of the school.

The regulations shall not override any statutory provisions that apply and complement the statutory requirements laid down in the South Gloucestershire scheme for the financing of schools.

The Financial Regulations for Schools shall only apply to maintained schools and not Academies or Free Schools. Academies and Free Schools must follow different arrangements put in place by the ESFA.

##### **3. Summary of Scheme Changes**

The DfE published updated guidance for Schemes for Financing Local Authority Maintained Schools (2026–2027) in March 2026.

The key position is as follows:

- No directed revisions have been issued by the Secretary of State for 2026–2027
- No updates have been made to the guidance content for this year

This means:

- there are no mandatory changes required to local authority schemes
  - previously directed provisions remain in force
  - existing compliance requirements continue unchanged
- As a result, the current South Gloucestershire Scheme for Financing Schools remains compliant with DfE guidance.

#### **4. Recommendations**

Members of the Forum are asked to:

- note that there are no directed revisions or updates to the DfE Scheme for Financing Schools for 2026–2027; and
- confirm that no amendments to the South Gloucestershire Scheme are required at this time.

Author

Michelle Palmer

Tel: 01454 863207

# **SOUTH GLOUCESTERSHIRE COUNCIL**

## **SCHOOLS FORUM**

**02<sup>nd</sup> July 2026**

**HIGH NEEDS WORKING GROUP – STRUCTURE OF WORKSTREAMS GOING FORWARD (VERBAL)**

## SCHOOLS FORUM FORWARD PLAN

|                  |                        |                                                                                                                  |                                 |
|------------------|------------------------|------------------------------------------------------------------------------------------------------------------|---------------------------------|
| <b>July 2026</b> | <b>02<sup>nd</sup></b> | <b>In-person at Marlwood School, Alveston</b>                                                                    |                                 |
|                  |                        | Schools in Financial Difficulty Update (Maintained Schools) (Report)                                             | Mustafa Salih                   |
|                  |                        | SEND Reform Update<br>General Send Reform Plan<br>SEND Reform Plan Funding                                       | Hilary Smith<br>Mustafa Salih   |
|                  |                        | Scheme for Financing Schools – DfE Directed Changes                                                              | Caroline Warren                 |
|                  |                        | High Needs Working Group - Structure of workstreams going forward                                                | Mustafa Salih                   |
|                  |                        | AOB<br>Confirmation of venue for 02 July<br>Future in-person and Teams meeting<br>Vote in new Chair of the Forum | Pippa Osborne/<br>Mustafa Salih |

|                  |                        |                                                                                          |                                 |
|------------------|------------------------|------------------------------------------------------------------------------------------|---------------------------------|
| <b>Sept 2026</b> | <b>24<sup>th</sup></b> | <b>Microsoft Teams</b>                                                                   |                                 |
|                  |                        | Schools Forum Membership update & Attendance                                             | Michelle Trigg                  |
|                  |                        | Outturn 2024-2025 Report                                                                 | Caroline Warren                 |
|                  |                        | Proposed Financial Arrangements – Falling Rolls Funding (Low Pupil Number Contingencies) | Caroline Warren                 |
|                  |                        | Financial Regulations for Schools                                                        | Justine Poulton                 |
|                  |                        | Place Planning                                                                           | Hilary Smith                    |
|                  |                        | Safety Valve update                                                                      | Mustafa Salih                   |
|                  |                        | Year 3 of New Banding and Top-Up Arrangements Review and Update (EHCP breakdown)         | Mustafa Salih / Caroline Warren |

## **ANY OTHER BUSINESS**

- 1. CONFIRMATION OF VENUE FOR 02 JULY**
- 2. FUTURE IN PERSON AND TEAMS MEETINGS**
- 3. VOTE IN NEW CHAIR OF THE FORUM**