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SCHOOLS' FORUM

MINUTES OF MEETING HELD ON FRIDAY 26 SEPTEMBER 2025

ATTENDANCE RECORD

			26 Sep	7 Nov	16 Jan	27 Feb	27 Mar	3 Jul
<i>MEMBERS</i>								
Secondary Maintained	Phil Jones (Chair)	Head Teacher - Ferndown Upper School	P					
	Keith Hales (Vice Chair)	Head Teacher - Beaminster School	P					
	Luana Girling	Governor - Lytchett Minster School	P					
Primary Maintained	Simon Smith	Head Teacher - Parrett & Axe Primary School	A					
	Andrew Johnson	Head Teacher - Conifers Primary School	P					
	Barbara Southcott	Governor - Cerne Abbas First School	P					
Special Maintained	Clive Padgett	Head Teacher - Yewstock School & College	A					
Learning Centre Maintained	David Dinsmore	Head Teacher - Dorchester Learning Centre	P					
Secondary Academy	Brian Boyes	Director of Secondary Education - Initio Learning Trust	P					
	Nick Rutherford	Head Teacher - Thomas Hardy School, Wessex MAT	P					
	Vacancy							
	Vacancy							
Primary Academy	Adam Gough	Head Teacher - Burton Bradstock Primary, Initio	P					
	Paul Lavis	Interim Director of Education - SAST	P					
	Giles Pugh	Trustee - DSAT	P					
	Debbie Shutts	Chief Financial Officer - Wessex MAT	P					
Special Academy	Katherine Seymour	Head Teacher - Wyvern Academy	P					
Learning Centre Academy	Kelly Knight	Head Teacher - Harbour Vale School, SAST	P					
Early years	Lorraine Clark	Proprietor - Hopscotch Pre-school	P					
	Dani Mark	Director - Muddy Monkeys Ltd	A					
Post-16	Kate Wills	Principal - Coastland College	P					
Trade Unions	Sarah Randell	NASUWT - Dorset Teachers' & Support Staff Council	P					
<i>NAMED OBSERVERS</i>								
Maintained Learning Centres	Kieren Hasler	Governor - Forum Centre	P					
Maintained Special Schools	Bruce Bonwell	Governor- Westfield Arts College	P					
Local Authority	Clare Sutton	Portfolio Holder for Children's Services	P					
Church Schools	Giles Pugh	Deputy CEO - DSAT	P					
Local Authority	Bridget Bolwell	Elected Member	-					
<i>OTHERS IN ATTENDANCE</i>								
Local Authority	Tom Easterbrook	Schools' Forum Officer, (Clerk)	P					

Key	
P	Present
A	Apologies
-	Absent without apologies
n/a	Not applicable

1. **Apologies, membership issues & current vacancies including:**

Apologies for absence were received from:

- Simon Smith
- Clive Padgett
- Dani Mark

Membership issues

The Chair welcomed several new representatives to the Forum and noted the successful induction session held earlier in the week.

Catherine Cresswell, Deputy Head Teacher at Cerne Abbas VC CE First School, attended the meeting as an observer.

Jon Moller, from Cheselbourne Village School, also attended as an observer.

Vacancies

There are currently three vacancies in the Secondary Academy sector, following the departure of Caroline Spearing at the end of the summer term. Forum members were invited to support outreach efforts to fill these vacancies. The Clerk will also reach out to DASH

Adam Gough informed Forum that he will be stepping down as a Primary Academy representative after Christmas due to a change in role to a maintained school. He expressed willingness to continue contributing to the Forum if a suitable maintained school vacancy arises.

2. **Declarations of Interest**

None

3. **Minutes and Actions from the Last Meeting**

Draft minutes of the meeting on 4th July 2025

The draft minutes of the meeting held on 4th July 2025 were reviewed and approved.

The Schools Forum Action log

Action 85 – Post-16 Provision:

Rolled over to the next meeting. This action was originally scheduled for resolution at this meeting, but has been deferred due to the timing of the new Director of Education's appointment.

Action 108 – Workshop Feedback:

To be reviewed and confirmed by the Clerk. If completed, it will be removed from the log; otherwise, the date will be updated.

Action 218 – Voting Arrangements for School Improvement Services:

Signed off following a detailed clarification from the Clerk. A written note was shared with Forum members outlining the distinction between:

Retained Education Functions, which must be applied to all maintained schools collectively.

Delegated Services, which may be consulted on and applied by phase (e.g. primary and secondary separately).

The clarification was based on the Schools Finance (England) Regulations and the Schools Finance Operational Guide. Forum members welcomed the clarity and requested that future consultation documents clearly distinguish

between these categories and their implications for maintained schools and academies.

Action 220 – Coombe House:

Rolled over to the next meeting due to the vacancy of the Director of Education.

Action 221 – Falling Rolls Fund:

To be reviewed and confirmed by the Clerk. If completed, it will be removed from the log; otherwise, the date will be updated.

4. Correspondence

Forum noted receipt of a response from the Secretary of State for Education following the F40 letter regarding SEND funding. Members acknowledged the reply and welcomed the ongoing work to nationally highlight the challenges around high needs funding.

5. Annual Review of the Maintained Schools' Scheme For Financing Schools

To consider a report from Tom Easterbrook, Schools Forum Officer, Schools, Finance and Support, Commissioning and Partnerships, People – Children Directorate

For Approval

Key points of discussion

Forum received a report outlining the results from the annual review of the Scheme for Financing Schools consultation. Two amendments were proposed as part of the consultation.

The first amendment reflects updated national guidance on energy provision. It clarified that, where a maintained school enters a contract with the Secretary of State for energy services, Dorset Council may recover unpaid bills from the school's budget share. This would only be actioned following due diligence by the local authority and confirmation of the circumstances surrounding the non-payment. The amendment ensures compliance with national expectations, although no Dorset schools are currently using this scheme.

The second amendment is a local clarification arising from recent audit work. It confirmed that all maintained schools are required to follow Dorset Council's Chart of Accounts, including by confirming the prohibition of internal trading codes ensuring consistency in financial reporting and alignment with statutory obligations.

A member sought clarity regarding the inclusion of schools that had converted to academy status in Appendix A of the scheme document. Officers confirmed that this would be corrected prior to publication.

Another member referenced a recent news article concerning local authority restrictions on the use of school funds for gifts paid for using the school budget. The member queried whether Dorset Council had similar guidance in place, particularly in relation to farewell gifts and hospitality. Officers confirmed that while the school budget must not be used to purchase gifts, reasonable hospitality, such as lunch provided during a training day, is

permitted. It was agreed that existing guidance would be reviewed and re-circulated to schools for clarity.

The Forum was informed that, of all responses received during the consultation period, only one raised an objection, specifically in relation to the energy provision amendment. This response had been considered and addressed in the accompanying paper.

Maintained school members agreed to the proposed changes unanimously

Actions:

2025/01

6. **Section 19 Placements Policy**

To consider a report from Miriam Leigh, Head of Children Thriving in Education, Education and Learning, People – Children Directorate
For Consultation

Key points of discussion

Forum received a report outlining Dorset Council's Section 19 Placements Policy, which sets out the local authority's statutory responsibilities for arranging education for children unable to attend school due to illness, exclusion, or other exceptional circumstances. The policy had been reviewed against legal guidance and has been discussed by senior officers prior to today's consultation with Forum.

The policy aimed to clarify roles and responsibilities, safeguard access to education, and formalise funding arrangements, particularly in cases of dual registration. While the policy did not include detailed figures, it described the principles used to determine contributions from schools.

Forum members broadly welcomed the policy's intent but raised several points of concern and clarification:

Funding Responsibilities and Equity

A member queried the duties on host schools in relation to funding, seeking clarity on whether this referred to the full cost of provision being born by the school or if only the funding received by the school for the student would be used to fund provision, with the balance being met by the authority.

Officers confirmed that the local authority may assume full responsibility for the cost of education where a return to school was no longer viable after a full academic year, and that schools would only be expected to contribute the funding they continued to receive for the pupil in the interim.

Another member challenged the assumption that all funding should be reclaimed, noting that schools retain safeguarding and oversight responsibilities for pupils in alternative provision. It was suggested that a portion of funding should remain with the school to reflect this ongoing role.

Officers recognised this and confirmed that funding arrangements would be determined on a case-by-case basis, with individual agreements outlining responsibilities and contributions.

A further concern was raised about consistency in decision-making across the county.

Officers confirmed that a framework would be developed to support equitable and transparent decisions.

Medical Evidence and Eligibility

Members raised questions about the requirement for medical evidence to support placements, noting that some locality teams had advised schools that such evidence was no longer necessary.

Officers confirmed that medical evidence was still expected, but that this could include a range of documentation such as appointment confirmations. Officers recognised the need to ensure consistency and clarity in expectations.

A member suggested that a standardised form for GP input could help ensure consistency and reduce ambiguity.

Policy Scope and Legal References

A member queried whether the policy should reference Section 61 of the Education Act as this is unclear.

Concerns were raised about references to “25 hours” of provision, with members noting that this may not always be appropriate or achievable.

Timing of Funding Adjustments

A member raised concerns about the timing of funding adjustments, noting that reclaiming based on the financial year may not accurately reflect the school budget cycle, leading to funding being reclaimed before it is received.

Officers agreed to explore whether adjustments could be aligned more closely with the academic calendar, subject to regulatory constraints.

Forum members welcomed the opportunity to provide feedback and noted the importance of ensuring the policy is both legally robust and practically workable.

Officers committed to reviewing the policy in light of the discussion and to issuing clear guidance to locality teams to ensure consistent implementation.

Actions:

2025/02

2025/03

7. Dedicated Schools' Grant (DSG) Outturn For 2025-26 Q1

To consider a report from Lee House, Service Manager (Finance) – Children's Services, Finance and Commercial, Corporate Development Directorate and Vanessa Eddey, Team Manager – Schools, Finance & Support

For Information

Key points of discussion

Forum received the Q1 outturn report for the Dedicated Schools Grant (DSG), covering the period to the end of July 2025. It was noted that this extended reporting period aligned with Dorset Council's internal financial cycle and committee scheduling.

The report highlighted a projected overspend of £52.5 million against the DSG, compared to the original budgeted overspend of £51 million. The increase was attributed primarily to continued pressure on independent sector placements and growth in demand within learning centres and resource provision within the High Needs Block. It was noted that some anticipated financial changes from top-up funding reviews were not yet reflected in the forecast, as their impact would be felt later in the financial year.

Forum members were reminded that payments from the Department for Education under the Safety Valve programme remain paused. Officers reported that significant work had taken place over the summer to address this, including a visit from a SEND adviser in July and a formal submission to the DfE on 12 September. A full update on the Safety Valve position is expected at the November meeting.

A member queried whether the Safety Valve programme was effectively ending, given the lack of new authorities being admitted. Officers acknowledged this uncertainty and highlighted that wider system and funding reform is expected in the forthcoming SEND White Paper.

Forum was also informed of a positive development regarding the Central Schools Services Block (CSSB). Dorset Council successfully evidenced its continued liability for historic retirement costs, resulting in the reinstatement of £76,000 to the CSSB allocation for this financial year. Officers reflected that it is likely the same process will need to be repeated next year.

A member requested that future reports include a simple breakdown of the DSG overspend, showing how the total is distributed across key areas such as independent placements and top-ups. Officers agreed to include this in the next report.

Forum received an update on the financial position of maintained schools at the end of the 2024–25 financial year. At year-end, 40 schools reported a surplus, with a combined total of £8.8 million. Five schools were in deficit, with a combined shortfall of just over £800,000.

For the current financial year, schools have submitted budget plans showing 39 schools in surplus and six in deficit. Officers noted that surpluses often appear lower at budget-setting due to the inclusion of contingency items and may increase as the year progresses.

Officers confirmed that there would be a renewed focus on how schools are using surplus balances, particularly where these exceed 8% of their annual funding. Schools are required to report on their plans for using excess balances, and officers will be reviewing these over a three-year period.

In relation to the Early Years Block, the Forum was informed that the budget has increased significantly due to the expansion of government-funded entitlements. From September 2025, working families can claim up to 30 hours of funded childcare for children aged two and above, and from nine months of age. The budget now stands at £45 million and is expected to rise again next year.

Officers acknowledged the challenge of monitoring this rapidly expanding area but confirmed that the budget remains on track. Rates for providers are set annually and will be reviewed again ahead of the next financial year.

Actions:

2025/04

8. School Improvement Service Impact Report

To consider a report from and Lisa Gray, interim Principal Lead – Best Education for All, Education and Learning, People – Children Directorate

For information

Key points of discussion

The Forum received a comprehensive update on the School Improvement Service, which continues to provide strategic and operational support to Dorset's schools. The service includes leadership development, recruitment support, school improvement planning, and governance development.

Officers outlined the role of Education Challenge Leads (ECLs), who work directly with schools to support headteacher appointments, facilitate school improvement meetings, and respond to specific challenges including Ofsted outcomes and financial pressures. The headteacher appraisal service, introduced last year, has been expanded and continues to be refined based on feedback.

A key focus this year is supporting schools in preparing for the revised Ofsted framework. ECLs are attending national training and will cascade learning to school leaders. The senior HMI for the South West is scheduled to attend the October leads meeting, and Forum members were invited to submit questions in advance.

The service has also strengthened its engagement with secondary schools, including the development of a peer-to-peer support model and "Leaders in Learning" visits to high-performing schools outside Dorset. Officers confirmed that support is being offered to existing collaborations to extend their reach and impact.

Forum was updated on the closure of the Chickerell Camp, which had provided temporary accommodation for Afghan families. Officers praised the response of Dorset schools, which successfully integrated 170 children into local education settings. Work is underway to capture learning from the project and share it with partners.

Governance development remains a priority. Officers acknowledged the challenge of engaging volunteer governors and confirmed that training materials will now be recorded and made available online to improve accessibility.

Looking ahead, the service is developing a Dorset-wide smartphone strategy in response to national concerns about mobile phone use in schools. A working group has been established, and stakeholder engagement is underway.

Members posed questions at the end of the discussion:

Funding and Access:

One member queried whether the service is funded solely through centrally retained funds and therefore only available to maintained schools. Officers confirmed that there is a core offer for maintained schools only, but our broader duties are for all schools through the Dorset Education board. clarity will be provided on funding arrangements as to the funding landscape at the next meeting

Members asked whether academies were engaging with the service. Officers confirmed that while academies are invited to attend leads meetings, most use their own improvement services and do not buy into the Dorset Core offer.

SACRE and RE Adviser Role:

A member queried the inclusion of Dorset SACRE in the impact report and asked whether it is funded through the School Improvement budget. Officers clarified that SACRE is funded separately via a dedicated allocation. The RE adviser role had recently been re-advertised through the Council's recruitment portal, and officers agreed to confirm whether the appointment had changed.

Forum members welcomed the breadth of the offer and the strategic direction of the service. Officers committed to providing further clarity on funding arrangements and to continuing to adapt the offer in response to school feedback.

Actions:

2025/05

2025/06

9. Early Years Reference Group Update

To consider a report from Tom Easterbrook, Schools Forum Officer, Schools, Finance and Support, Commissioning and Partnerships, People – Children Directorate

For Information

Key points of discussion

An update was provided on the Early Years Reference Group, established in March 2025 as the Forum's first formal subgroup. The group met shortly before the previous Schools Forum meeting and held a successful initial session.

The update confirmed the membership of the group and highlighted the positive engagement from early years providers. Discussions focused on the expansion of government-funded entitlements and the operational challenges faced by settings.

Forum members welcomed the creation of the group, noting that it provides a valuable space for early years settings to share concerns, contribute to consultations, and build peer support networks. It was reported that feedback from recent Early Years Managers Briefings had been positive, and the group was seen as an important additional layer of representation for the sector.

The next meeting of the Reference Group is scheduled for mid-October.

10. Any other business

Key points of discussion

Forum members were informed of a local authority-led research initiative focused on children's access to play. Information will be circulated following the meeting, and schools and settings are encouraged to take part in the study.

DATES, TIMES AND VENUES FOR FUTURE MEETINGS

Dates, Times and Venues for Future Meetings

Date			Venue	Type
2025/26				
Friday, 2025	7th	November	In Person (County Hall, Dorchester)	Workshop
Friday, 2026	16th	January	Online (MS Teams)	Regular
Friday, 2026	27th	February	Online (MS Teams)	Regular
Friday, 27th March 2026			In Person (County Hall, Dorchester)	Workshop
Friday, 3rd July 2026			Online (MS Teams)	Regular

Date			Venue	Type
2026/27				
Friday, 2026	25th	September	Online (MS Teams)	Regular
Friday, 2026	6th	November	In Person (County Hall, Dorchester)	Workshop
Friday, 2027	15th	January	Online (MS Teams)	Regular
Friday, 2027	26th	February	Online (MS Teams)	Regular
Friday, 26th March 2027			In Person (County Hall, Dorchester)	Workshop
Friday, 2 nd July 2027			Online (MS Teams)	Regular

APPENDIX A - Action Log

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Action Log

Title	Meeting Date	Minute	Action	Officer	Expected Completion Date
85	05/11/21	2.3.2	Provide updates on post-16 capacity		07/11/25
108	09/06/23	Workshop	'Gather data on the trend of AlternativeProvision (AP) and assess the suitability of utilising the Learning C		07/11/25
206	05/07/24	5.2.8	Provide an update on short breaks and post 19 provision for those with complex SEND needs	Paula Golding;	16/01/26
214	27/09/24	7.2.4	Rework inclusion incentives paper	Ellen Eager	
220	28/03/25	2.2.9	Provide Combe House Student Profile	Ross Bowell	07/11/25
221	28/03/25	8.1.1	Provide list of ISP providers	Ross Bowell;	07/11/25
2025/01	26/09/25	2.2.5	Review and circulate guidance relating to hospitality and gifts	Vanessa Eddey; ;Vikki Murphy	07/11/25
2025/02	26/09/25	3.2.7.1	Review funding adjustment timings	Ellen Eager;	07/11/25
2025/03	26/09/25	3.2.9	Share final section 19 policy	Miriam Leigh;	07/11/25
2025/04	26/09/25	4.2.6	Share key drivers for HNB overspend	Lee House;	07/11/25
2025/05	26/09/25	5.2.8.1	Share overall funding picture for school improvement service	Lisa Gray;Vanessa Eddey;#Hannah Chapple;	
2025/06	26/09/25	5.2.8.3	Confirm outcome of RE advisor appointment	Lisa Gray;Richard Howes;	07/11/25

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