Public Document Pack

Schools' Forum

Date: Friday, 27 March 2026
Time: 2.00 pm
Venue: Online (MS Teams)

All members and named observers of the Dorset Schools Forum are requested to attend this meeting of the Forum. A full list of the current membership and any vacancies can be found here.

A full list of the Schools Forum's powers and responsibilities can be found here

For more information about this agenda please contact Tom Easterbrook, Schools Forum Officer on 10305 224567 or by email to tom.easterbrook@dorsetcouncil.gov.uk

Members of the public are welcome to attend this meeting as a silent observer by giving 5 working days' notice to the Schools Forum Officer using the information above.

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Agenda

To consider a report from **Ed Denham**, Sufficiency of School Places Manager, Education & Learning, People – Children Directorate

For approval

Items for Consultation

6. HIGH NEEDS BLOCK BUDGET SETTING 2026-27 25 - 38

To a consider report from:
Steve Gorson, Service Manager (Children's Finance) –, Finance & Commercial, Corporate Development Directorate
Ross Bowell, Head of Service Health, Education & SEND Commissioning, Commissioning and Partnerships, People – Children Directorate
Ellen Eager, Sufficiency and Funding Manager Health, Education & SEND Commissioning, Commissioning and Partnerships, People – Children Directorate

For consultation

7. UPDATE ON MAINSTREAM SCHOOLS' FUNDING FORMULA FOR 2026-27 IN THE SCHOOLS' BLOCK 39 - 42

To consider a report from
Ross Bowell, Head of Service – Health, Education and SEND Commissioning
Vanessa Eddey, Team Manager – Schools Finance & Support

For consultation

8. ANNUAL REVIEW OF THE CONSTITUTION, ELECTION PROCEDURES FOR SCHOOLS' FORUM 43 - 54

To consider a report from **Tom Easterbrook,** Schools Forum Officer, School Finance and Support, Education and Learning, People – Children Directorate

For consultation

Items for information

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To a consider report from:
Steve Gorson, Service Manager (Children's Finance) –, Finance & Commercial, Corporate Development Directorate

For Information

10. ANY OTHER BUSINESS

SCHOOLS' FORUM MINUTES OF MEETING HELD ON FRIDAY 16 JANUARY 2026

ATTENDANCE RECORD

			26 Sep	7 Nov	16 Jan	27 Feb	27 Mar	3 Jul
		MEMBERS						
Secondary Maintained	Phil Jones (Chair)	Head Teacher - Ferndown Upper School	P	P	P	Reserve date, meeting not required		
	Keith Hales (Vice Chair)	Head Teacher - Beaminster School	P	P	P			
	Luana Girling	Governor - Lytchett Minster School	P	P	A			
Primary Maintained	Simon Smith	Head Teacher - Parrett & Axe Primary School	A	P	P			
	Andrew Johnson	Head Teacher - Conifers Primary School	P	A	P			
	Barbara Southcott	Governor - Cerne Abbas First School	P	P	P			
Special Maintained	Clive Padgett	Head Teacher - Yewstock School & College	A	P	P			
Learning Centre Maintained	David Dinsmore	Head Teacher - Dorchester Learning Centre	P	P	A			
Secondary Academy	Brian Boyes	Director of Secondary Education – Initio Learning Trust	P	A	A			
	Nick Rutherford	Head Teacher - Thomas Hardye School, Wessex MAT	P	P	A			
	Vacancy							
	Vacancy							
Primary Academy	Adam Gough	Head Teacher - Burton Bradstock Primary, Initio	P	P	-		-	-
	Paul Lavis	Interim Director of Education - SAST	P	P	P			
	Giles Pugh	Deputy Director of Education and Finance Director - Salisbury Diocesan Board of Education	P	P	P			
	Debbie Shutts	Chief Financial Officer - Wessex MAT	P	P	P			
Special Academy	Katherine Seymour	Head Teacher - Wyvern Academy	P	P	P			
Learning Centre Academy	Kelly Knight	Head Teacher - Harbour Vale School, SAST	P	P	P			
Early years	Lorraine Clark	Proprietor - Hopscotch Pre-school	P	A	P			
	Dani Mark	Director - Muddy Monkies Ltd	A	P	P			
Post-16	Kate Wills	Principal - Coastland College	P	A	P			
Trade Unions	Sarah Randell	NASUWT - Dorset Teachers' & Support Staff Council	P	P	-			
		NAMED OBSERVERS						
Maintained Learning Centres	Kieren Hasler	Governor - Forum Centre	P	P	P			
Maintained Special Schools	Bruce Bonwell	Governor- Westfield Arts College	P	A	P			
Local Authority	Clare Sutton	Portfolio Holder for Children's Services	P	P	A			
Church Schools	Giles Pugh	Deputy Director of Education and Finance Director - Salisbury Diocesan Board of Education	P	P	P			
Local Authority	Bridget Bolwell	Elected Member	-	P	-			
		OTHERS IN ATTENDANCE						
Local Authority	Tom Easterbrook	Schools' Forum Officer, (Clerk)	P	P	P	-		

Key	
P	Present
A	Apologies
-	Absent without apologies / not due to attend
n/a	Not applicable

20. Apologies for Absence

The Chair invited the Clerk to present any apologies for absence. The Forum noted apologies from:

- **Luanna Girling**
- **Cllr Clare Sutton**
- **David Dinsmore**

The Clerk also provided a brief update on membership vacancies, confirming that engagement with academy trusts continues and that one trust has indicated interest in taking up an additional representative seat in line with proportionality arrangements. No further comments were raised.

21. Start of Year Updates

The Clerk provided several brief updates at the outset of the meeting:

- **February Reserve Date** – The Forum was advised that the February 2026 reserve meeting would not be used**,** as the High Needs Block budget will not be ready for consideration until the March meeting. Officers will continue working closely with the special school sector to share emerging information to support budget planning.
- **March Meeting and SEND White Paper** – Members were reminded that the planned High Needs Block workshop will take place only once the SEND White Paper has been published and sufficient time has been allowed for analysis. This remains central to understanding the future financial position.
- **Forum–Education Board Link** – Work is underway to strengthen alignment between Schools Forum and the Dorset Education Board, ensuring stronger strategic flow between finance discussions and wider system planning. It was noted that Luanna Girling has recently been elected as a governor member of the Education Board, creating a natural link between the two groups. A fuller update will be brought to the Forum in March.

22. Minutes and Actions from the Last Meeting

No points of accuracy were raised, and the minutes of the meeting held on 7 November 2025 were approved.

Reviewing the Action Log, the Forum agreed that several outstanding actions relate directly to the High Needs Block and would be more effectively addressed as part of the comprehensive HNB paper scheduled for the March 2026 meeting. Members supported this consolidated approach.

Updates noted:

- **Action 206** – The Clerk confirmed renewed progress following contact with the relevant officer team. A fuller update will be brought to the March meeting.

Members sought clarification on whether any expected January actions would now be delayed. The Clerk confirmed that remaining items will be incorporated into the HNB discussion in March, ensuring they are considered in full system context.

23. Declarations of Interest

None

24. Correspondence

Chairs Letter to the Secretary of State

a) The Forum received the Chair's letter to the Secretary of State, setting out the Forum's November decision not to support a further transfer from the Schools Block to the High Needs Block. The letter also highlighted Dorset's strong local commitment to improving SEND provision and the need for the Department for Education to resume its role within the Safety Valve arrangement.

Members noted that no response has yet been received. Several expressed disappointment at the lack of acknowledgement given the seriousness of the pressures facing High Needs funding nationally. It was suggested that a collective reply to multiple authorities may still be issued.

During discussion, Members restated that the Forum's decision should not be interpreted as a reduced commitment to SEND. Rather, the letter made clear that schools cannot be the only contributors to deficit recovery at a time when Safety Valve payments remain paused

F40 Briefing Paper

b) The Forum received the latest F40 briefing paper, which Members noted provides additional national context on school and High Needs funding pressures. The Chair highlighted that many headteachers will already have direct access to F40 updates, but that it remains useful for Forum to consider the implications collectively.

Members considered the comparative funding information presented in the paper, which shows that Dorset remains one of the lowest-funded authorities for High Needs. This was recognised as a significant factor contributing to the scale of Dorset's High Needs deficit. Members commented that current funding levels are based on historic spending patterns set many years ago and do not reflect the complexity or cost pressures schools and local authorities face today.

It was noted that F40 continues to lobby for a fairer and more modern national funding formula. Members agreed that although the underlying formula is politically sensitive, there is merit in continued campaigning for a more equitable distribution of resources nationally.

Letter from Cheselbourne Village School

c) The Forum considered a letter from Cheselbourne Village School, presented on behalf of the Learning First alliance of five first schools, together with two partner schools. The letter sets out concerns regarding the national funding position and urges schools across Dorset to support coordinated lobbying of local MPs, drawing on the evidence and recommendations highlighted in the latest F40 materials.

Members heard that the letter had been developed following discussion with the F40 group, who had reviewed and endorsed its content. The intention is for the letter to be shared widely across Dorset schools, inviting governing bodies to sign and return it so that a collective representation can be made to MPs.

Forum Members welcomed the letter and thanked the authors for the time and initiative shown in bringing forward this proposal. It was noted that the issues raised align closely with Forum discussions on national funding formulas and the High Needs position.

During the item, Members emphasised the value of coordinated action and indicated that school leaders across all phases should be made aware of the letter. It was agreed that the local authority would share the letter with leaders to support wider circulation.

25. Dedicated Schools' Grant Budget Setting For 2026-27

The Forum received the DSG budget paper for 2026–27. Officers confirmed that Dorset's final DSG allocation for the year is £387.2 million, an overall increase of £16.5 million (4.4%). Members noted the increases of £6.9m in the Schools Block, £4.8m in the Early Years Block, and £4.7m in the High Needs Block. Officers advised that the Schools Block and Early Years Block would be considered separately later on the agenda, while the High Needs Block would be brought to the March meeting.

During the presentation, Members queried an apparent discrepancy between pupil growth and falling rolls figures shown in two tables within the report pack. Officers explained that one figure represented the DSG allocation received from the DfE, while the other reflected the proposed budget level for 2026–27, and that Dorset was not proposing to pass through the entire allocation in order to support affordability within the Schools Block.

The Chair also commented that one of the pages in the report pack provided helpful clarity around the cost of servicing the cumulative DSG deficit and appreciated the inclusion of this context.

Officers then outlined the proposed allocation for the Central Schools Services Block (CSSB), including:

- contribution to responsibilities the local authority holds for all schools: £698,904
- school admissions: £475,000

- servicing of Schools Forum: £53,200
- Dorset SACRE: £6,000
- miscellaneous: £51,600
- DSG premature retirement commitments: £525,400
- copyright licences (excluding VAT): £359,000

Members were reminded that the historic commitments element has again been reduced by 20%, and that Dorset will submit evidence to the DfE to seek reinstatement, as in previous years.

Voting Summary

- Contribution to responsibilities the local authority holds for all schools (£698,904): **For 15 | Against 0 | Abstentions 0**
- Admissions (£475,000): **For 14 | Against 0 | Abstentions 1**
- Servicing of Schools' Forum (£53,200): **For 14 | Against 0 | Abstentions 1**
- Dorset SACRE (£6,000): **For 14 | Against 0 | Abstentions 1**
- Miscellaneous (£51,600): **For 13 | Against 0 | Abstentions 2**
- DSG Premature Retirement commitments (£525,400): **For 13 | Against 0 | Abstentions 2**
- Licences (excl. VAT) (£359,000): **For 13 | Against 0 | Abstentions 2**

26. Early Years Funding Formula 2026-27: Proposed Changes and Central Retention

The Forum received the Early Years funding paper, with officers explaining that significant national policy changes had shaped the proposals for 2026–27. Members heard that the Early Years Reference Group had met twice during 2025 to consider options and would meet again once the forthcoming SEND White Paper was published.

Officers summarised the two consultations undertaken with providers: the first in December, covering central retention and the three- and four-year-old supplements, and the second in early January seeking views on the proposed hourly rates and Early SEND Support funding. The consultation feedback and comments were included within the meeting papers.

Turning to the financial position, officers highlighted that the Early Years Block for 2026–27 had increased to £50.5 million. Members also noted the new requirement that at least 97% of funded entitlements is passed through and the move to a termly census.

On central retention, officers proposed an increase of £37,577 to meet pay inflation. The Consultation outcome was that while some providers had concerns about the LA retaining funds for central retention, some disagree that the services provided by the LA (eg Best start in life advisers) are useful and some thought the budget should not be increased. However, the Forum noted that overall consultation feedback supported the proposal. The Forum voted to approve the increase.

Officers then proposed increasing the Early SEND Support budget from £250,000 to £300,000 to reflect rising levels of need, while maintaining existing funding rates. Members supported the proposal.

When considering the three- and four-year-old rate, officers set out three scenarios that were affordable within the allocation and aligned with consultation feedback. All options include an increase in the base rate that is higher than the increase provided by the DfE due to the careful use of the termly funding adjustment. The option recommended by Early Years representatives retained the current supplement structure while increasing the deprivation supplement where possible. The Forum approved this option by clear majority, with one Member selecting an alternative scenario. This set the 2026–27 three- and four-year-old base rate at £5.94.

For two-year-olds and under twos, officers confirmed that the funding provided by the DfE had been passed through in full as a flat base rate with no supplements. Members supported this approach, establishing the two-year-old rate at £7.77 and the under two rate at £10.49.

Voting Summary

Central retention: Unanimous approval (For 15 | Against 0 | Abstentions 0)

Three- and four-year-old funding scenario: Scenario 1 – 14 votes | Scenario 2 – 1 vote | Scenario 3 – 0 votes

27. Mainstream Schools Funding Formula For 2026-27

The Forum considered the Mainstream Schools Funding Formula for 2026–27. Officers explained that Dorset's Schools Block allocation had increased by £6.9 million, but that the increase included rolled in grants rather than additional core funding. After modelling the formula, Dorset was not able to afford to implement the National Funding Formula (NFF) values in full. As a result, it was necessary to adjust the basic entitlement and to seek the Forum's view on the level of the Minimum Funding Guarantee (MFG) in order to set a balanced budget.

Two options were presented. Both assumed the previously submitted request for a 0.5% transfer from the Schools Block to the High Needs Block. Option 1 retained the MFG at 0%, while Option 2 reduced the MFG to –0.5%. Officers highlighted that reducing the MFG would remove protection from eight schools—mostly smaller primaries and two middle schools—removing around £100,000 of MFG top-ups across those settings. Members noted that the alternative option would redistribute only a very small amount of funding to other schools, providing limited benefit in return.

Officers confirmed that Dorset's proposed factor values continued to reflect the proportional increases set out in the NFF, but that affordability pressures meant that the NFF could not be delivered in full this year. Members also sought clarification on the significantly higher factor value allocated to one secondary school; officers confirmed that this related to a PFI factor and was not discretionary funding.

After discussion, the Forum agreed to support Option 1, retaining the MFG at 0%.

A member highlighted that the combined effect of the block transfer and falling rolls means 55 primary schools will have a lower cash budget in 2026-27 compared to 2025-26. It raises the question of long term financial sustainability in the education estate and whether any closures or mergers might be necessary and if so can this be planned in a logical and controlled way rather than being organic. The LA responded that whilst the falling rolls group is currently paused, this will be picked up in the work to strengthen the alignment between the Schools Forum and the Dorset Education Board.

Officers also presented two applications for exceptional premises funding. One school hires a village hall for PE because it does not have an on-site hall, and another rents facilities from Kingston Maurward. Both cases met the criteria for exceptional premises, and the Forum approved the applications.

Voting Summary

- Preferred option for the 2026–27 Schools Block formula: **Option 1 – 11 | Option 2 – 0** (no abstentions recorded)
- Exceptional premises (inadequate facilities): **For 10 | Against 0 | Abstentions 1**

28. Annual Review of the Arrangements for Early Years Provision

The Forum received the annual review of arrangements for Early Years provision. Officers explained that Early Years and childcare is now one of the government's highest priority reform areas, with significant emphasis on the importance of children's earliest experiences for later learning, behaviour and wellbeing. Members were reminded that the national ambition is for at least 75% of children nationally, and 76.4% in Dorset, to achieve a good level of development at the end of the Early Years Foundation Stage by 2028.

Officers highlighted the rapid expansion of Early Years entitlements since 2023 and the increasing demand for childcare places, particularly for younger children. The Forum also noted the statutory requirement for the council to publish a Childcare Sufficiency Assessment and a Best Start Local Plan, which bring together responsibilities relating to childcare access, early identification, the readiness of children and families for school, and the readiness of schools to support them.

Members were informed that Dorset continues to work closely with Early Years providers, health services and schools to strengthen transition arrangements and ensure children's needs are understood earlier. Officers shared that Dorset is currently supporting 276 children either in settings or at home, including those without Education, Health and Care Plans, and that there is ongoing work to identify children not currently accessing Early Years provision.

The Forum also noted recent capital investment to support the expansion of places, including Section 106 and DfE funding, and that several school based nurseries have already benefited from this. Officers confirmed that further updates will be provided once the DfE announces the outcome of bids submitted in December for the next phase of capital funding.

Members were updated on the closure of the Dorchester Opportunity Group and informed that the majority of affected children had already been successfully placed in mainstream Early Years settings.

Finally, officers highlighted the importance of continued joint working through the Dorset Education Board, particularly in relation to improving early identification of need and ensuring more consistent transition pathways into school.

29. Any other business

Under Any Other Business, the Chair invited Members to raise any additional items.

An update was provided on the building maintenance insurance scheme (BMIS). Members were advised that the scheme had become financially unsustainable at current contribution levels due to rising costs. Officers noted that Dorset Council had supported the scheme in the previous year, but future contributions would need to increase to ensure the scheme’s viability. Members asked when revised contribution levels would be available to support their budget planning, and officers confirmed that indicative figures would be issued before half term.

A query was raised regarding the timing of communications to schools about BMIS. Officers reiterated that work was underway with the relevant teams and that schools would receive updates as soon as possible.

The Forum also received an update on the trade union facilities scheme. Following the earlier decision not to de-delegate for secondary schools, officers confirmed that the service would continue to be available on a traded basis at the same rate that would have applied through de-delegation. This would allow secondary schools continued access to support while enabling a fuller review of costs and eligibility ahead of the next round of decision making.

No further items were raised.

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Title	Meeting Date	Action	Officer	Expected Completion Date
206	05/07/24	Provide an update on short breaks and post 19 provision for those with complex SEND needs	Paula Golding;#37	27/03/26
214	27/09/24	Rework inclusion incentives paper	Ellen Eager;#22	27/03/26
220	28/03/25	Provide Combe House Student Profile	Ross Bowell;#100	07/11/25
221	28/03/25	Provide list of ISP providers	Ross Bowell;#100	07/11/25
2025/01	26/09/25	Review and circulate guidance relating to hospitality and gifts	Vanessa Eddey;#23;#Vikki Murphy;#53	27/03/26
2025/03	26/09/25	Share final section 19 policy	Miriam Leigh;#93	07/11/25
2025/04	26/09/25	Share key drivers for HNB overspend	Lee House;#20	07/11/25
2025/05	26/09/25	Share overall funding picture for school improvement service	Lisa Gray;#114;#Vanessa Eddey;#23;#Hannah Chapple;#19	27/03/26
2025/06	26/09/25	Confirm outcome of RE advisor appointment	Lisa Gray;#114;#Richard Howes;#130	07/11/25
2025/07	07/11/25	Provide data on specialist-in-mainstream placements, associated costs, and sufficiency planning for rev	Ellen Eager;#22;#Hannah Davis;#59	27/03/26
2025/08	07/11/25	Provide detailed update on sufficiency planning and capacity projects, including timelines for new provisi	Sean Cremer;#56;#Jen Furnell;#135	27/03/26

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Dorset Council

Dorset Schools' Forum

Date of Meeting:	**27 March 2026**
Report Title:	**Pupil Growth Allocations 2025-2026 & 2026-2027 Academic Years (Payable in Financial Year 2026-2027)**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Corporate Director:	**Jen Furnell, Director for Education and Learning**
Report Author: Title: Tel: Email:	Ed Denham School Place Sufficiency Manager 01305221939 ed.denham@dorsetcouncil.gov.uk
Presenting Officer:	**Ed Denham, School Place Sufficiency Manager – Children's Services**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For APPROVAL/ ~~INFORMATION /CONSULTATION~~*** (select one option) **Under Forum power/responsibility**: 1(b)(i) significant pre-16 pupil growth to support the LA's duty for basic need place planning, including pre-opening and diseconomy of scale costs, and agreeing the qualifying criteria for schools to access the fund
Recommendation(s):	a) The following Allocations to be made to these schools in the 2026-2027 Financial Year: (see table below) This is a total of £199,783 for financial year 2026-2027. The Pupil Growth allocation from the DSG is £360,000. This would leave a balance of £160,217

School	Amount
Appendix A – Wimborne First (A)	£ 42,482
Appendix B – Beaminster St Mary (A)	£ 39,776
Appendix C – Ferndown First (A)	£ 117,525
Total	£ 199,783

Reason for Recommendation(s):	To enable the Local Authority to deliver its statutory duty to secure sufficient school places.
DECLARATIONS OF INTEREST	**Schools' Forum members are reminded of their responsibility to make a declaration of interest in any agenda item in which they have an interest, to the Chair or the Clerk, preferably in advance of the meeting.**

1. Executive Summary

The provision of Pupil Growth allows the Local Authority and schools to work together to ensure the provision of sufficient school places, a statutory duty.

Proposed Funding 2026-2027:

1.1 Wimborne First – This is to cover ongoing support for a bulge year that will be moving into Year 4 in Sept 2026. There are currently only 2 places in Year 3 across Wimborne Town thus we wish to retain the bulge cohort into Year 4. Value of £42,482 for the period April 26-Mar 27.

1.2 Beaminster St Mary Primary – This is to cover the additional class funding for the academic year 25-26 – funded between April 26 to Aug 26 (6 places). In addition, there is the cost to retain additional capacity in Year 5 & Year 6 for Sept 26-Mar 27 – (9 places). The other three neighbouring schools are full in their current combined Year4/5 classes – thus there is need to retain this surplus capacity in Beaminster. Total £39,776 for 2026-2027 financial year (Year 5 / 6 cohort).

1.3 Ferndown First School – The LA needs to continue to support the bulge class in current Year 2 and then into Year 3 in Sept 26. In addition, we need to commission 26 new places in the reception cohort for Sept 2026. Total value is £117,525 between April 26 – Mar 27. Currently FFS, Parley, St Mary's West Moors and Oakhurst are all projected to be full in Sept 2026 - only leaving spaces at Three-Legged Cross and Hampreston. Without the additional capacity there would have been significant numbers of Dorset children without a school place.

2. Financial Implications

This is a total of £199,783 for financial year 2026-2027. The Pupil Growth allocation from the DSG is £360,000. This would leave a balance of £160,217

3. Well-being and Health implications

Pupil Growth, while ensuring the LA is able to perform its duty to provide schools places, also ensures the following:

3.1 That there are local school places for each child which ensures good interaction between families and the wider school community

3.2 Walking to school initiatives are able to thrive with places being made available for local families.

4. Climate Implications

The Local Authority has looked at balancing the competing demands and needs of:

4.1 Local school places for local children
4.2 Limiting journeys for children accessing school places at significant distance from the home
4.3 Ensuring existing capacity is used appropriately and efficiently

5. Other implications

None Identified

6. Risk Assessment

Having considered the risks associated with this decision, the level of risk has been identified as:
Current Risk: Low
Residual Risk: Low

7. Equalities Impact Assessment (EqIA)

The Pupil Growth Policy supports the Admissions Duty of the Local Authority. The Admissions Duty and the policies that unpin that duty have their own EQIA which is available on request.

8. Appendices

Appendix A: Wimborne First – March 2026

Appendix B: Beaminster St Mary Primary – March 2026

Appendix C: Ferndown First – March 2026

9. Background Papers

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.

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PUPIL GROWTH APPLICATION FOR

This form should only be used for **Temporary growth at existing school (bulge year)**

Page 1	**Wimborne First**		For the financial year	**2026-27**
	First	**Academy**		

Step 1: Has the Pyramid/Area meeting identified that this school should be the one to temporarily expand to meet basic need in the area? This decision is based upon predicted numbers and takes account of availability of existing places, ability of school to expand efficiently, new housing proposals, local geography and present/future catchment areas. Provide details evidencing consultation below	Yes	Date of meeting	

Step 2: Commentary of application

<u>This application is to provide Schools Forum with foresight to a Pupil Growth issue as a result of the closure of St Catherines RC In Wimborne.</u>

The Minister for School Systems has given in-principle decision to terminate the Funding Agreement for St Catherines RC Primary in Wimborne - part of the Plymouth CAST. In order to ensure sufficient capacity an addtional class has been commissioned at Wimborne First School (Part of the Hamwic Trust) for Reception 2021.

The funding for St Catherines for the 2021-2022 academic year sits with the ESFA/DFE and it is expected that gap funding for Wimborne First to hold this extra class in Reception 2021 will come from these funds held outside of Dorset.

A total of £90,504 would be provided for the academic year 2021-2022. This would be paid in two tranches, £54,059 in the financial year 2021-202 to cover the period Sept 21- Mar 22. This woud be followed by a payment of £36,445 in financial year 2022-2023 for the period Apr 22 - Aug 22.

Recommended- Financial Year 2022-2023: To support Year 1 in September 2022 that are not at 26 per class and then support a New Year Reception Cohort. There are only 150 places in Wimbiorne Town available, with 147 first preferences already in the system.
Residual from Academic Year 2021-2022 - £36,445
Ghost funding for Year 1 - Sept 22- Mar 2023 £10,555
New Class Septmber 2022-Mar 2023 - £57,839
TOTAL - £104,839 for Financial Year 2022-2023

Recommended Financial Year 23-24:
Ghost Funding April23-Mar 24 = £86,020
New Class Funding - Reception 2023 - Sept 23-Mar24 = £59,673
TOTAL - £145,693

Recommended Financial Year 24-25:
Residual New Class Funding for Reception 2023 intake - April24-Aug 24 = £43,712
Ghost Funding 15 places in Year 1/2 - April 24 - Mar 25 = £64,560 - Funding to cease when cohort moves to Year 3 and ceases to be ICS and school can organise into 2 classes.
NO NEW BULGE YEAR
TOTAL - £108,272

Recommended for Financial Year 2025-2026:

Residual Class funding for Year 2 April 25 - Aug 25 = £29,107
Year 3 funding to retain capacity - Sept 25 - Mar 26 = £28,015 - numbers up at 67, only 1 Year 3 place in Wimborne Town - thus continue to operate the bulge.

TOTAL - £57,122

<u>RECOMMENDED FINANCIAL YEAR 2026-2027:</u>
This is a continuing interest application. Additional places were added to Wimborne First in September 2022 to the reception cohort. The school has been funded for the difference between census and the 26 place principle. This the final year of the current cycle as the current Year 2 which was subject to Pupil Growth continues to grow and is at 87 on roll.
The funding requested is as follows:
1. April 2026-Aug 2026 - to cover the year 3 cohort for th rest of the academic year - 11 places £21,050
2. Sept 2026-Mar 2027 - to cover the same cohort as Year 4's - with 70 on roll at census 2025 - 8 places need to be supported under the 26 place funding principle for this period - £21,432
TOTAL - £42,482
These 8 places wil be subject to a further request at March 2027 Schools Forum for the period April 2027-Aug 2027.

Step 3: Criteria

Do not write in or delete these rows			
	Q1a. Is the increase ½ FE or more for this primary school?	Yes	go to Q1c
	Q1b. blank		
	Q1c. Can you avoid the extra class by mixing ages (including across key stages)	No	
	Please complete the proposed PAN increase box and move on to page 2		
	What is the proposed PAN increase?	30	
	NOW COMPLETE NEXT SECTION		

	2024-25		**2025-26**		**2026-27**	
*Class Values paid =26*AWPU *proportion of year*	*Class cost 5/12 £43,713*	*Class cost 7/12 £61,198*	*Class cost 5/12 £47,298*	*Class cost 7/12 £66,218*	*Class cost 5/12 £47,298*	*Class cost 7/12 £66,218*
Pupils funded through formula for year		*347.00*		*347.00*		*355.00*
Pupils not funded through formula for 7/12th year		*-*		*8.00*	*-*	*18.00*

Academic Yr commencing Sept 2023

	R	1	2	3	4	5	6		Min Class Funded Places
PAN	60	60	60	60	60				
Class 1	26							**26**	0
Class 2	26							**26**	0
Class 3	26							**26**	0
Class 4		21						**21**	5
Class 5		21						**21**	5
Class 6		20						**20**	6
Class 7			30					**30**	0

Academic Yr commencing Sept 2024

	R	1	2	3	4	5	6		Min Class Funded Places
Sept PAN	90	60	60	60	60				
Class 1	30							**30**	0
Class 2	30							**30**	0
Class 3		26						**26**	0
Class 4		26						**26**	0
Class 5		26						**26**	0
Class 6			21					**21**	5
Class 7			21					**21**	5

	R	1	2	3	4	5	6		
Class 8			30					30	0
Class 9			30					30	0
Class 10				29				29	0
Class 11				28				28	0
Class 12					30			30	0
Class 13					30			30	0
Class 14								0	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
	78	62	90	57	60	0	0	347	16

	Min	Actual
Min number of KS1 classes needed (30/cl)	8	
Min number of KS 2 classes needed (32/cl)	4	
Min number of classes needed	12	13

	R	1	2	3	4	5	6		
Class 8			20					20	6
Class 9				30				30	0
Class 10				30				30	0
Class 11				30				30	0
Class 12					29			29	0
Class 13					28			28	0
Class 14								0	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
	60	78	62	90	57	0	0	347	16

	Min	Actual
Min number of KS1 classes needed (30/cl)	7	
Min number of KS 2 classes needed (32/cl)	5	
Min number of classes needed	12	13

Academic Yr commencing Sept 2025

Sept	R	1	2	3	4	5	6		Funded
PAN	90	90	60	60	60	60	60		
Class 1	30							30	0
Class 2	30							30	0
Class 3		30						30	0
Class 4		30						30	0
Class 5			26					26	0
Class 6			26					26	0
Class 7			26					26	0
Class 8				23				23	3
Class 9				22				22	4
Class 10				22				22	4
Class 11					30			30	0
Class 12					30			30	0
Class 13					30			30	0
Class 14								0	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
Class 22								0	0
Class 23								0	0
Class 24								0	0
Class 25								0	0
Class 26								0	0
Class 27								0	0
	60	60	78	67	90	0	0	355	11

	Min	Actual
Min number of KS1 classes needed (30/cl)	7	
Min number of KS 2 classes needed (32/cl)	5	
Total Number of classes	12	13

Academic Yr commencing Sept 2026

Sept	R	1	2	3	4	5	6		Class
PAN									
Class 1	30							30	0
Class 2	30							30	0
Class 3		30						30	0
Class 4		30						30	0
Class 5			30					30	0
Class 6			30					30	0
Class 7				29				29	0
Class 8				29				29	0
Class 9				29				29	0
Class 10					24			24	2
Class 11					23			23	3
Class 12					23			23	3
Class 13								0	0
Class 14								0	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
Class 22								0	0
Class 23								0	0
Class 24									0
Class 25									0
Class 26									0
Class 27								0	0
	30	60	60	87	70	0	0	337	8

	Min (30)	Actual
Min number of KS1 classes needed (30/cl)	5	
Min number of KS 2 classes needed (32/cl)	5	
Total Number of classes	10	12

Other comments about the number of classes

FUNDING

Financial Year

		2024-25		2025-26		2026-27
Ghost Places		16		11		8
manual adjustments (yrs shown above where ghost funding never applicable)						
manual adjust (yrs shown above where ghost funding applicable in next financial year)						
Exempt Pupils: KS1>32 or KS2>34 (diff to next whole class of 30)						
Adjusted ghost places		16		11		8
5/12th from previous year — April - August			2024-25	£ 36,445	2025-26	£ 21,050
7/12th from this year — September - March	2024-25		2025-26	£ 28,015	2026-27	£ 21,432

Class Funding

Class Size Minimum 26

		2024-25	2025-26	2026-27
Is there an additional class?		yes	yes	yes
If so how many?		1	1	0
Is this reasonable? (adjust)				
If no increase in classes, is there an increase in pupils		0	0	0
What percentage increase is this across the school?		0.0%	0.0%	0.0%
	AWPU	£ 4,035.00	£ 4,366.00	£ 4,366.00
Class Funding awarded	Amount	£ 58,844	£ 66,218	£ -

Class Set Up

			2024-25		2025-26		2026-27
Are set up costs payable?	Pan Increase		30		30		30
Management Allowance			£ 1,085.00		£ 1,000.00		£ -
Class Set up per pupil							
New Class		£65	£ 1,950.00	£65	£ 1,950.00	£65	

MFG

	2024-25	2025-26	2026-27
Did the school receive any MFG? (to be reduced from the amount paid)	£ -	£ -	

	2024-25	2025-26	2026-27
Summary of Funding	£ 61,879	£ 133,628	£ 42,482

Dated 19 March 2026

PUPIL GROWTH APPLICATION FOR

This form should only be used for **Temporary growth at existing school (bulge year)**

Page 1	**Beaminster St Mary**		For the financial year	**2026-27**
	Primary	**Academy**		

Step 1: Has the Pyramid/Area meeting identified that this school should be the one to temporarily expand to meet basic need in the area? This decision is based upon predicted numbers and takes account of availability of existing places, ability of school to expand efficiently, new housing proposals, local geography and present/future catchment areas. Provide details evidencing consultation below	Yes	Date of meeting	

Step 2: Commentary of application

New APPLICATION - A Midcyle application -

This is to introduce more capacity in Year 3 and Year 4 in the West Dorset Area. Currently Salway Ash, Broadwindsor, Beaminster St. Mary and Parrett & Axe are all full or running very large mixed classes. An approach was made to Beaminster St Mary as they have the classroom space to see if they wouldbe prepared to split their Year 3 Year 4 combined class from September 2024 onwards. They have agreed to do so subject to Pupil Growth to support the addtional revenue costs this will present.

It has been agreed that this will be reviewd each year to see if these two cohorts can be re-mixed if numbers no longer warrant separate classes.

RECOMMENDED 2024-2025 - The Application is for £68,532 to cover the period Sept 24 - Mar 25 and then £46,781 to cover the period April 25 - Aug 25 (Financial Year 25-26 - subject to the Basic Entitlement rate).

RECOMMENDED 2025-2026 - The April 25-Aug25 value is £52,769 - based on 26 places @£4,871. In addition to cover the period from Sept 25-Mar 26 - 6 missing Year 4 pupils - @£4871 = £17,048.50. TOTAL For the period - £69,818

RECOMMENDED FINANCIAL YEAR 2026-2027: There is ongoing interest in this application. Addtional capacity was required in the area in 2024-2025 - where Years 3 & 4 across the area were full. The relevant cohorts will be joining Year 5 & 6 in Sept 2026. These cohorts are full and over number in Broadwindsor, Parret & Axe and Salway Ashe. The combined cohorts at St Marys' could not be brought together as they would be at 43.
The following payments to be made:
1. For period April 2026-Aug 2026 - 6 places for the remainder of the Academic Year - £12,830
2. For period Sept 2026-Mar 2027 - 9 places across Year 5 & Year 6 based on the minimunm 26 class size funding protocol - £26,946.
TOTAL - £39,776
Those 9 places will also receive funding for the period April 2027-Aug 2027 - presented to Schools Forum in March 2027.

Do not write in or delete these rows

Q1a. Is the increase ½ FE or more for this primary school?	Yes	go to Q1c
Q1b. blank		
Q1c. Can you avoid the extra class by mixing ages (including across key stages)	No	
Please complete the proposed PAN increase box and move on to page 2		
What is the proposed PAN increase?	30	

NOW COMPLETE NEXT SECTION

	2024-25		2025-26		2026-27	
*Class Values paid =26*AWPU *proportion of year*	*Class cost 5/12 £48,655*	*Class cost 7/12 £68,117*	*Class cost 5/12 £52,769*	*Class cost 7/12 £73,877*	*Class cost 5/12 £52,769*	*Class cost 7/12 £73,877*
Pupils funded through formula for year		*115.00*		*120.00*		*132.00*
Pupils not funded through formula for 7/12th year		*5.00*		*12.00*	-	*11.00*

Academic Yr commencing Sept 2023

	R	1	2	3	4	5	6		Min Class Funded Places
PAN	30	30	30	30	30				
Class 1	21							**21**	5
Class 2		17	18					**35**	0
Class 3				18	12			**30**	0
Class 4						11	18	**29**	0
Class 5								**0**	0
Class 6								**0**	0
Class 7								**0**	0
Class 8								**0**	0
Class 9								**0**	0
Class 10								**0**	0
Class 11								**0**	0
Class 12								**0**	0
Class 13								**0**	0
Class 14								**0**	0
Class 15								**0**	0

Academic Yr commencing Sept 2024

	R	1	2	3	4	5	6		Min Class Funded Places
Sept **PAN**	30	30	30	30	30				
Class 1	21							**21**	5
Class 2		21						**21**	5
Class 3			17					**17**	9
Class 4				19				**19**	7
Class 5					18			**18**	8
Class 6						12	12	**24**	2
Class 7								**0**	0
Class 8								**0**	0
Class 9								**0**	0
Class 10								**0**	0
Class 11								**0**	0
Class 12								**0**	0
Class 13								**0**	0
Class 14								**0**	0
Class 15								**0**	0

	R	1	2	3	4	5	6		
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
	21	17	18	18	12	11	18	115	5

	Min	Actual
Min number of KS1 classes needed (30/cl)	2	
Min number of KS 2 classes needed (32/cl)	2	
Min number of classes needed	4	4

	R	1	2	3	4	5	6		
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
	21	21	17	19	18	12	12	120	36

	Min	Actual
Min number of KS1 classes needed (30/cl)	2	
Min number of KS 2 classes needed (32/cl)	2	
Min number of classes needed	4	6

Academic Yr commencing Sept 2025

Sept

PAN	R	1	2	3	4	5	6		Funded
Class 1	22							22	4
Class 2		21						21	5
Class 3			17					17	9
Class 4				18				18	8
Class 5					20			20	6
Class 6						21	13	34	0
Class 7								0	0
Class 8								0	0
Class 9								0	0
Class 10								0	0
Class 11								0	0
Class 12								0	0
Class 13								0	0
Class 14								0	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
Class 22								0	0
Class 23								0	0
Class 24								0	0
Class 25								0	0
Class 26								0	0
Class 27								0	0
	22	21	17	18	20	21	13	132	32

	Min	Actual
Min number of KS1 classes needed (30/cl)	2	
Min number of KS 2 classes needed (32/cl)	3	
Total Number of classes	5	6

Academic Yr commencing Sept 2026

Sept

PAN	R	1	2	3	4	5	6		Class
Class 1	*							0	0
Class 2		22						22	4
Class 3			21					21	5
Class 4				17				17	9
Class 5					18			18	8
Class 6						20		20	6
Class 7							23	23	3
Class 8								0	0
Class 9								0	0
Class 10								0	0
Class 11								0	0
Class 12								0	0
Class 13								0	0
Class 14								0	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
Class 22								0	0
Class 23								0	0
Class 24									0
Class 25									0
Class 26									0
Class 27								0	0
	0	22	21	17	18	20	23	121	35

	Min (30)	Actual
Min number of KS1 classes needed (30/cl)	2	
Min number of KS 2 classes needed (32/cl)	3	
Total Number of classes	5	6

Other comments about the number of classes

FUNDING

Financial Year

		2024-25		2025-26		2026-27
Ghost Places		36		32		35
manual adjustments (yrs shown above where ghost funding never applicable)		-21		-26		-26
manual adjust (yrs shown above where ghost funding applicable in next financial year)						
Exempt Pupils: KS1>32 or KS2>34 (diff to next whole class of 30)						
Adjusted ghost places		15		6		9
5/12th from previous year	April - August		2024-25		2025-26	£ 12,830
7/12th from this year	September - March	2024-25	2025-26	£ 52,769	2026-27	£ 26,946

		2024-25	2025-26	2026-27
Class Funding				
Class Size Minimum	26			
Is there an additional class?		yes	yes	yes
If so how many?		1		0
Is this reasonable? (adjust)				
If no increase in classes, is there an increase in pupils		0	0	0
What percentage increase is this across the school?		0.0%	0.0%	0.0%
	AWPU	£ 4,491.20	£ 4,871.00	£ 4,871.00
Class Funding awarded	Amount	£ 65,497	£ -	£ -

		2024-25		2025-26		2026-27
Class Set Up						
Are set up costs payable?	Pan Increase	30				30
Management Allowance		£ 1,085.00		£ -		£ -
Class Set up per pupil						
New Class	£65	£ 1,950.00	£65	£ -	£65	

MFG

	2024-25	2025-26	2026-27
Did the school receive any MFG? (to be reduced from the amount paid)	£ -	£ -	
Summary of Funding	£ 68,532	£ 52,769	£ 39,776

Dated 19 March 2026

PUPIL GROWTH APPLICATION FOR

This form should only be used for **Temporary growth at existing school (bulge year)**

Page 1	**Ferndown First**		For the financial year	**2026-27**	
	First	**Academy**			
Step 1: Has the Pyramid/Area meeting identified that this school should be the one to temporarily expand to meet basic need in the area? This decision is based upon predicted numbers and takes account of availability of existing places, ability of school to expand efficiently, new housing proposals, local geography and present/future catchment areas. Provide details evidencing consultation below			Yes	Date of meeting	

Step 2: Commentary of application

CONTINUING INTEREST:

September 2018 - DCC required Ferndown First to take 3 classes at Reception Entry - they have 88 on roll currently in that cohort.
September 2019 - DC required the school to take a further 90 into Reception 2019. It was a recommened that £42,860 was paid to the school to manage this additional class. They rose from 11 to 12 teaching groups.

September 2020 - DC will require Ferndown First to take a further 90 children (1FE more) into reception in September 2020. In addtion the school will receive support funding for the September 2020 Year 1 cohort where the classes are operatimg below 25 and thus a total of 10 additional places need to be funded. They will rise from 12 to 13 teaching groups.

September 2021 - DC and Ferndown First are looking to limit to 60 the intake for September. There is still a continuing interest in supporting the year groups that were increased. There are two year groups (Year 1 and Year 2 - September 2021) that still require support.

The school would have been funded through census for 63 in current reception and 73 for current Year 1. The funding is based on census returns. Forum needs to note that the reception cohort is up to 68 and Year 1 is up to 76 - emphasising the need to continue to have the flexibility in these year groups and 'ghost' funding places.

RECOMMENDED payments in 2021-2022 Financial Year:
£13,997 (April 21-Aug 22)
£30,527 (Sept 21 - Mar 22)
TOTAL: £44,524

RECOMMENDED payments 2022-2023 Financial Year: This is to continue to support the 2 bulge classes (September 2022 Year 2&3) that are still not operating at the minimum 26.
£22,925 (April 22- Aug 22)
£34,388 (Sept 22- Mar 23)
TOTAL £57,313

2022-2023 Financial Year - a further bulge of 30 places was agreed for placement in Reception September 2022.

RECOMMENDED 2023-2024 Financial Year to support 23 Ghost places across 3 bulge years - £93,725 from April 23-Mar 24.

RECOMMENDATION for 24-25 Financial Year - ongoing support for 2 bulge years - total of 23 places April 24- Aug 24 and 12 places for Sept 24 - Mar 25 - £71,872.
A bulge year is also being added at Reception for Sept 2024 - but no funding required as number of classes is remaining the same due to a 3FE cohort leaving at Year 4. This class may require ghost funding in 25-26 - the additional cohort is supported as there are minimum 22 children in the West Moors, Ferndown, Parley, Three Legged Cross and St Ives areas that are without a school place.

RECOMMENDATION - Continuing Support for Year 2 bulge that is anticipated to be at 77 for September 2025 - 1 place short of the 26 minimum funded places. So 1 place to be funded Sept 25-Mar 26 @£4694 pro rata. In addition 2 places for the Year 1 cohort bulge @4694 prorata for April 25 - Aug 25. TOTAL £6,650

FINANCIAL YEAR 2026-2027 - There is ongoing interest in providing funding for the low-number group in Year 1 that falls within Academic Year 2025-2026, and then further support to Year 1 and Year 3 as they will be working at 3FE but the cohorts were not at viability threshold of 78 at Oct 2025 census. In addtion we are looking for FFS to add an additional class in Reception for September 2026. Currently FFS, Parley, St Mary's West Moors and Oakhurst are all projected to be full in Sept 2026 - only leaving spaces at Three-Legged Cross and Hampreston. Without the additional capacity there would have been signifcant numbers of Dorset children without a school place.
1. For period April 2026 - Aug 2026 - 1 place needs funding (Year 1) at £2,059
2. For period Sept 2026-Mar 2027 - 7 places in Year 1 and 6 places in Year 3 need to be funded based on the 26 class size criteria - £37,477
3. For period Sept 2026-Mar 2027 - a New Class funded stream - with startup costs will require £77,989
TOTAL - £117,525.
Further requests to cover April 2027-Aug 2027 will be presented to Forum in Match 2027.

Step 3: Criteria

Do not write in or delete these rows

Q1a. Is the increase ½ FE or more for this primary school?	Yes	go to Q1c
Q1b. blank		
Q1c. Can you avoid the extra class by mixing ages (including across key stages)	No	
Please complete the proposed PAN increase box and move on to page 2		
What is the proposed PAN increase?	30	

NOW COMPLETE NEXT SECTION

	2024-25		2025-26		2026-27	
*Class Values paid =26*AWPU *proportion of year*	*Class cost 5/12* *£46,952*	*Class cost 7/12* *£65,732*	*Class cost 5/12* *£50,852*	*Class cost 7/12* *[illegible]*	*Class cost 5/12* *£53,538*	*Class cost 7/12* *£74,954*
Pupils funded through formula for year	*349.00*		*1,081.0[illegible]*		*353.00*	
Pupils not funded through formula for 7/12th year	*732.00*		*- 728.00*		*20.00*	

Academic Yr commencing Sept 2023

	R	1	2	3	4	5	6		Min Class Funded Places
PAN	60	60	60	60	60				
Class 1	26							26	0
Class 2	26							26	0
Class 3	26							26	0
Class 4		22						22	4
Class 5		22						22	4
Class 6		22						22	4
Class 7			30					30	0
Class 8			30					30	0
Class 9				23				23	3
Class 10				23				23	3
Class 11				22				22	4
Class 12					25			25	1
Class 13					26			26	0
Class 14					26			26	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
	78	66	60	68	77	0	0	349	23

	Min	Actual
Min number of KS1 classes needed (30/cl)	7	
Min number of KS 2 classes needed (32/cl)	5	
Min number of classes needed	12	14

Sept

Academic Yr commencing Sept 2024

	R	1	2	3	4	5	6		Min Class Funded Places
PAN	90	60	60	60	60				
Class 1	26							78	0
Class 2	26							78	0
Class 3	26							78	0
Class 4		26						74	0
Class 5		25						73	0
Class 6		25						73	0
Class 7			30					90	0
Class 8			30					90	0
Class 9				33				82	0
Class 10				33				82	0
Class 11					27			75	0
Class 12					27			78	0
Class 13					26			78	0
Class 14								52	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
	78	76	60	66	80	0	0	1081	0

	Min	Actual
Min number of KS1 classes needed (30/cl)	8	
Min number of KS 2 classes needed (32/cl)	5	
Min number of classes needed	13	14

Sept

Academic Yr commencing Sept 2025

	R	1	2	3	4	5	6		Funded
PAN	90	90	60	60	60	60	60		
Class 1	26							26	0
Class 2	26							26	0
Class 3	26							26	0
Class 4		26						26	0
Class 5		26						26	0
Class 6		26						26	0
Class 7			26					26	0
Class 8			26					26	0
Class 9			25					25	1
Class 10				30				30	0
Class 11				30				30	0
Class 12					30			30	0
Class 13					30			30	0
Class 14								0	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
Class 22								0	0
Class 23								0	0
Class 24								0	0
Class 25								0	0
Class 26								0	0
Class 27								0	0
	78	78	77	60	60	0	0	353	1

	Min	Actual
Min number of KS1 classes needed (30/cl)	8	
Min number of KS 2 classes needed (32/cl)	4	
Total Number of classes	12	13

Sept

Academic Yr commencing Sept 2026

	R	1	2	3	4	5	6		Class
PAN									
Class 1	30							30	0
Class 2	30							30	0
Class 3	30							30	0
Class 4		24						24	2
Class 5		24						24	2
Class 6		23						23	3
Class 7			26					26	0
Class 8			26					26	0
Class 9			26					26	0
Class 10				24				24	2
Class 11				24				24	2
Class 12				24				24	2
Class 13					31			31	0
Class 14					31			31	0
Class 15								0	0
Class 16								0	0
Class 17								0	0
Class 18								0	0
Class 19								0	0
Class 20								0	0
Class 21								0	0
Class 22								0	0
Class 23								0	0
Class 24									0
Class 25									0
Class 26									0
Class 27								0	0
	60	71	78	72	62	0	0	373	13

	Min (30)	Actual
Min number of KS1 classes needed (30/cl)	7	
Min number of KS 2 classes needed (32/cl)	5	
Total Number of classes	12	14

Other comments about the number of classes

FUNDING

Financial Year

		2024-25	2025-26	2026-27
Ghost Places		0	1	13
manual adjustments (yrs shown above where ghost funding never applicable)				
manual adjust (yrs shown above where ghost funding applicable in next financial year)				
Exempt Pupils: KS1>32 or KS2>34 (diff to next whole class of 30)				
Adjusted ghost places		0	1	13

5/12th from previous year	April - August		2024-25	£ 36,445	2025-26	£ 2,059
7/12th from this year	September - March	2024-25	2025-26	£ 2,738	2026-27	£ 37,477

		2024-25	2025-26	2026-27
Class Funding				
Class Size Minimum	26			
Is there an additional class?		yes	yes	yes
If so how many?		1		1
Is this reasonable? (adjust)				
If no increase in classes, is there an increase in pupils		0	0	0
What percentage increase is this across the school?		0.0%	0.0%	0.0%
	AWPU	£ 4,334.00	£ 4,694.00	£ 4,942.01
Class Funding awarded	Amount	£ 63,204	£ -	£ 74,954
Class Set Up				
Are set up costs payable?	Pan Increase	30		30
Management Allowance		£ 1,085.00	£ -	£ 1,085.00
Class Set up per pupil				
New Class	£65	£ 1,950.00	£65 £ -	£65 £ 1,950.00
MFG				
Did the school receive any MFG? (to be reduced from the amount paid)		£ -	£ -	
		2024-25	2025-26	2026-27
Summary of Funding		£ 66,239	£ 39,183	£ 117,525

Dorset Schools' Forum

Date of Meeting:	**27th March 2026**
Report Title:	**Dedicated Schools Grant (DSG) 2026/27**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Director	**Jen Furnell, Director of Education and Learning**
Report Authors: **Title:**	**Steve Gorson (Service Manager – Children's Finance)** **Hannah Chapple (Senior Accountant – Children's Finance)** **Ross Bowell (Head of Service Head of Service Health, Education & SEND Commissioning)** **Ellen Eager (Sufficiency and Funding Manager)**
Presenting Officer:	**Steve Gorson (Service Manager – Children's Finance)**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For APPROVAL & CONSULTATION as detailed in the report** **Under Forum power/responsibilities**: 1(b) (i), (ii), (viii), (x), (xi) Central spend on Pupil Growth; Admissions; servicing of Schools' Forum, and contribution to responsibilities local authorities hold for all schools. and 2b) iv) administering the allocation of central government grants paid to schools via the local authority. and

	2d) such other matters concerning the funding of schools which the LA sees fit and 2f) The establishment of priorities where the draft budget strategy indicates that additional money is expected to become available or where a shortfall compared to the current financial year is anticipated. **FOR APPROVAL** a. None **FOR CONSULTATION** a. None
Recommendation(s):	To note the DSG allocations from central government in relation to 2026/27, and the projected spend against those funding allocations in each block, where available. To provide a formal view on the approvals contained in the section above.
Reason for Recommendation(s):	Schools' Forum is sighted on the overall budget allocations for 2026/27 in totality. To meet the requirements to consult with Schools' Forum over decisions relating to the Schools' Budget as required by the Schools' Standards and Framework Act 1998, the Schools' Forum (England) Regulations 2012, and the Schools' and Early Years' (Finance) England Regulations.
DECLARATIONS OF INTEREST	**Schools' Forum members are reminded of their responsibility to make a declaration of interest in any agenda item in which they have an interest, to the Chair or the Clerk, preferably in advance of the meeting.**

1. Executive Summary

1.1. The provisional DSG allocation for 2026/27 was announced by the DfE on the 17 December 2025. Dorset's allocation is £387.2m.

1.2. The overall increase in DSG allocation for Dorset is £16.5m (4.4%). £4.8m of the increase is within the Early Years Block, £4.7m increase in the High Needs Block and £6.9m to the Schools Block.

Table 1: 2026 to 2027 DSG allocations (£), before deductions for national non-domestic rates, and direct funding of high needs places by Education and Skills Funding Agency (ESFA) plus the additional funding announcement

	Schools Block	Central School Services Block	High Needs Block	Early Years Block	Total
DSG Allocation	269,608,315	2,169,104	64,896,913	50,555,910	387,230,242
Mainstream Schools Additional Grant: indicative allocation					-
Additional high needs allocation					-
Total available funding 2026-27	269,608,315	2,169,104	64,896,913	50,555,910	387,230,242
Total available funding 2025-26	262,663,518	2,160,057	60,208,139	45,721,070	370,752,784
£ - Change	6,944,797	9,047	4,688,774	4,834,840	16,477,458
% - Change	2.6%	0.4%	7.8%	10.6%	4.4%

1.3. A breakdown of the DSG allocation, before recoupment and deductions, can be found in Appendix A.

1.4. What has been agreed so far:

1. CSSB
2. Schools Block
3. Early Years Block

1.5. This paper completes the DSG 2026/27 budget build with the High Needs Block (HNB) and the finalised Schools Block and Individual Schools Budgets position.

1.6. For financial year 2026/27 High Needs Block recharges have been removed from the budget and so Schools Forum will not be asked for their approval as in previous years.

1.7. The 2026/27 High Needs Block is summarised in Table 2:

£m	2023-24	2024-25	2025-26 * Q3	2026-27
TOTAL HNB FUNDING	-53.82	-56.02	-60.21	-64.90
TOTAL BUDGET REQUIREMENT	77.44	94.22	116.16	136.89
TOTAL DSG IN-YEAR DEFICIT / (SURPLUS)	23.66	37.29	55.95	71.99
CUMULATIVE DEFICIT (INC. BLOCK TRANSFERS)	59.57	95.63	150.26	220.91

TABLE 2: HNB Summary position

1.8. This is based on the expected increase in the number of children and young people requiring an EHCP (circa 4,700 to 5,014 by January 2027), increased investment into mainstream SEND (mainstream specialist packages) and increased costs in the independent specialist market and Alternative Provision.

2. Schools Block and Individual Schools Budgets 2026/27

2.1. Options for closing the budget shortfall were discussed at the January 2026 Schools' Forum.

2.2. Following the meeting, it was confirmed by the Secretary of State that the proposed block transfer of 0.5% has been approved. This equates to approximately £1.348m and Forum were presented with options 1 and 2 which included the block transfer.

2.3. Forum voted in favour of Option 1 to close the gap of £1.359m which was to reduce basic entitlement down compared to NFF. Officers used Forum's preferred option 1 in order to prepare the APT (Authority Proforma Tool) and that version has now been approved as compliant by the DfE.

2.4. Notification of the High Needs Block deficit grant came after the block transfer was confirmed by the Secretary of State.

2.5. Final basic entitlement values submitted and agreed are as follows:

Basic Entitlement	Dorset 2025-26	NFF 2026-27	Dorset 2026-27	Diff from 2025-26	% Diff	Diff from NFF	% Diff
Primary	£3,847	£4,064	£4,033	£186	4.84%	-£31	0.76%
KS3	£5,422	£5,686	£5,643	£221	4.07%	-£43	0.76%
KS4	£6,113	£6,410	£6,361	£248	4.06%	-£49	0.76%

TABLE 3: Final basic entitlement values

3. High Needs Block: National context

3.1. The focus on SEND, Local Authority deficits and the national picture continues to sharpen.

3.2. This is useful context demonstrating that Dorset is not in a unique position and overall national reform and change in funding is required combined with local strategies.

3.3. On 9 February 2026, the High Needs Stability Grant was announced. This outlined proposals for central government to provide a grant to cover up to 90% of the High Needs-related DSG deficit up to 31st March 2026.

3.4. Each Local Authority is required to submit a Local SEND Reform Plan and this plan requires Secretary of State for education approval prior to any grant being made available.

3.5. First drafts of the local SEND plans are due by 19th June 2026.

4. High Needs Block: Dorset

4.1. The high needs funding block is a single block for local authorities to spend on provision for pupils and students aged 0 to 25, with high needs. Dorset's base budget allocation is £64.9m; an increase of £4.7m.

4.2. This increase to the high needs block is slightly misleading as multiple other grants, previously received separately, have now been rolled into the high needs block allocation for Dorset totalling £4.689m.

4.3. The amounts that the Local Authority are required to distribute for these grants is based upon different criteria than the grant monies received, this has been challenged unsuccessfully with the

DFE. The total amount of grant to be distributed in 26-27 is £5.17m which creates a high needs block pressure of £0.481m.

4.4. High needs block funding for Dorset in 26-27 has therefore seen a real terms decrease of around £0.5m.

4.5. The funding for the block was previously based on a high needs national funding formula covering 12 factors, however this has been suspended for 26-27. Instead, local authority allocations have been based upon their 25-26 allocations with some adjustments.

4.6. The suspension of the national funding formula comes following wider reforms as set out in the SEND white paper released on 23rd February 2026. The impact of the white paper on High Needs block funding for Dorset is still to be established.

4.7. Given the funding issues mentioned above, modelling has predicted that the High Needs Block is £73.33m short of a balanced budget for financial year 26-27 with forecast expenditure at £138.23m, an increase of £22.0m on the quarter 3 forecast for 25-26. The increase of £22.0m includes the additional £5.17m of grant to be distributed as mentioned above. This is based on the following variables (Table 4):

Assumption description	Assumption
Number of children and young people (CYP) with an EHCP	5,014 (Jan '27)
New local specialist placements become available	183
Change in the FTE number of children and young people requiring an independent specialist placement	24
Increase in budget for Alternative Provision	25%
Costs driven by the external market, not independent specialist provision	Office of Budgetary Responsibility CPI

TABLE 4: Main HNB Variables

4.8. Appendix B details the overall HNB breakdown by each area. A summary below:

4.9. <u>Places (£24.8m | 17.9% of the entire HNB)</u>

4.10. This section of the HNB funds the place funding at special schools, learning centres, resourced provision and further education. This covers Dorset and Other Local Authority children in Dorset schools.

4.11. An additional 183 places are planned to be commissioned in 2026-27 as the SEND capital strategy continues and the strategy to use Dorset funded provision matures.

4.12. The total number of places is 2022.

4.13. <u>Placements and Direct Payments (£36.3m | 26.3% of the entire HNB)</u>

4.14. A projection of 330 Full Time Equivalent (FTE) children and young people will require independent specialist provision in 2026-27. This broadly equals a headcount of 407 children and young people.

4.15. The current number of children and young people in independent specialist provision is 306 FTE as at the end of January 2026. The increase to 330 FTE has been modelled by Mastodon C.

4.16. Top up payments (£53.8m | 39.0% of the entire HNB)

4.17. This area funds the top up packages, depending upon a young person or child's need at a mainstream, special school, resourced provision, learning centre and further education settings.

4.18. This includes the Mainstream Specialist top up, an amount of £6.9m to support 339 children and young people to remain within a mainstream setting.

4.19. AP and Exceptional Packages (£13.5m | 9.8% of the entire HNB)

4.20. Funding alternative provision (non-learning centre) and other bespoke packages to support additional need. This budget has been increased by 25% for 26-27 following historic trends and based upon the predicted new framework.

4.21. NHS Support, Contracts and Development, Other (£9.7m | 7.0% of the entire HNB)

4.22. This covers 60.03 FTE teachers and colleagues who run the Hearing and Vision Support Service, the Physical and Medical team, Specialist Teachers and Best Start in Life.

4.23. This also funds teaching provision at the Kingfisher Ward at the Dorset County Hospital and Outreach, Mentoring and SALT contracts.

4.24. Other is the section for grants that are now payable from the High needs block allocation which were previously separate totalling £5.17m. This includes grants for what was previously Teachers pay and pensions and the CSBG (Core Schools Budget Grant).

5. Demographics

5.1. To support the HNB 2026-27 budget, Dorset Council have again engaged Mastodon C to review, analyse and project the number of children and young people with an EHCP and what type of setting they would be within over the next six years. This data has been used for the 2026-27 budget build and adjusted where newer information is available.

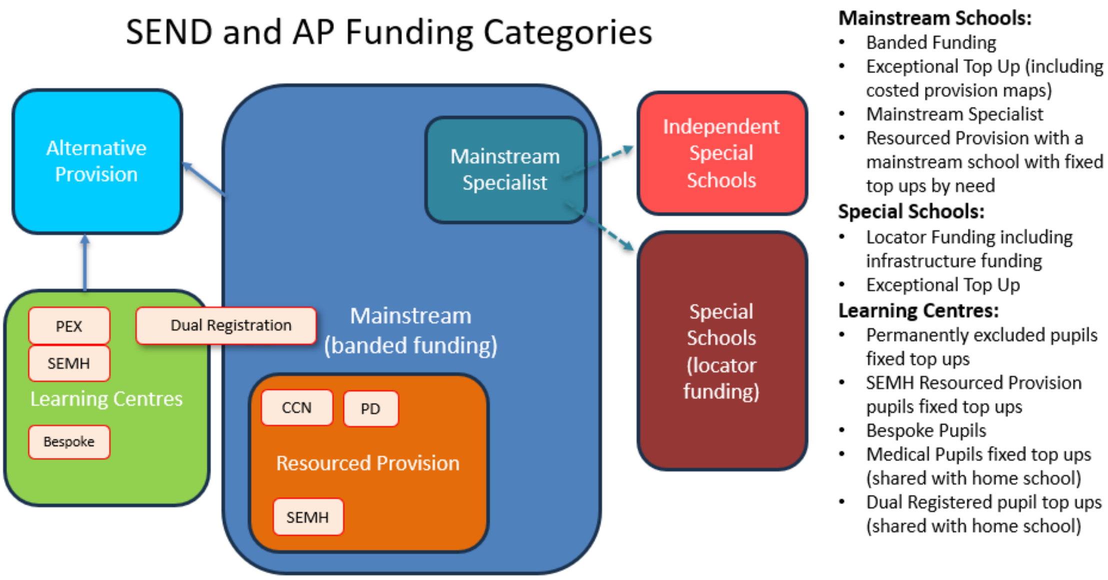
5.2. Mastodon C offer an independent and specialist service that has been used by Local Authorities nationwide.

5.3. A summary of Mastodon C's analysis:

1. The number of children and young people with an EHCP will continue to grow with an anticipated peak in 2032-33 of 5,518.
2. The year-on-year growth of children and young people is projected to decline, stabilising around a 0.5-1% growth towards the end of the decade.

5.4. Mastodon C are projecting a plateau for the number of children and young people with an EHCP. This is broadly achieved through a forecast declining birth rate and reducing 0-25 population.

6. SEND Top up funding



6.1. Dorset Council will engage with schools and settings through Schools' Forum as part of considering the SEND Reform changes and in response to the challenges of financial sustainability and value for money in this area, along with the practicalities of accessing exceptional funding. While recognising further work is required to understand the changes ahead, Dorset Council has budgeted for top-ups in 2026-27 as set out below.

6.2. **Mainstream schools:** The banding rates will be reviewed for 2026/27. The current rates, which came into effect from September 2025 are shown below:

	Band A		Band B	
	Lower	Upper	Lower	Upper
2026-27	£2,061	£3,679	£5,389	£8,468

6.3. With the introduction of mainstream specialist funding, the increased volume and cost of exceptional top-ups and the new banding rates, Dorset Council will have increased HNB investment in mainstream schools from £5m in 2022-23 to more than £20m forecast for 2026-27. This is equivalent to 7.4% of the Schools Block funding.

6.4. **Special schools:** Locator values were uplifted by 6% with effect from September 2025, and infrastructure rates were increased by 3%. These funding rates are budgeted to continue at these levels for 2026-27:

	Locator 2	Locator 3	Locator 4	Locator 5	Locator 6	Locator 7	Locator 7+	Locator 7++
Wef September 2025	794	2,915	5,567	8,493	12,191	19,329	30,151	46,391
Previous rate	749	2,750	5,252	8,012	11,501	18,235	28,444	43,765

From September 25	Places	Infrastructure General	Split Site	Hydrotherapy	Locator >=7+,>25%	per place
Beaucroft	230	386,439	164,907			2,397.16
The Harbour	140	386,439				2,760.28
Mountjoy	110	386,439		17,510		3,672.26
Westfield	230	386,439	119,480			2,199.65
Wyvern	90	386,439		17,510	154,500	6,204.99
Yewstock	165	386,439	132,977	17,510		3,254.10

6.5. **Learning Centres:** We will apply the CPI funding inflator as agreed in 2024 to September 2026 top ups and infrastructure payments as follows:

AY 2025/26	Primary PEX/SEMH	Primary DR/Medical	SEMH	Secondary PEX	Secondary DR/Medical		
	14,900	9,100	13,800	12,700	4,000	Infrastructure	436,800
from main registration school		5,800			8,700		

AY 2026/27	Primary PEX/SEMH	Primary DR/Medical	SEMH	Secondary PEX	Secondary DR/Medical		
	15,200	9,400	14,070	12,950	4,250	Infrastructure	445,536
from main registration school		5,800			8,700		

6.6. **Resourced Provisions:** The banding rates are budgeted to continue at the current uplifted rates, with updated hub specification documents to be issued shortly:

Communication and interaction, and SEMH hubs

Inclusion Hub:	Top Up Per Pupil Key Stage 1/2	Key Stage 3	Key Stage 4
14 Place	£ 14,672	£ 13,244	£ 12,591
10 place	£ 15,687	£ 14,239	£ 13,606
6 place	£ 16,706	£ 15,258	£ 14,625

Physical Disability bases

PD base funding wef September 2025	Top up per pupil Key Stage 1/2	Key stage 3	Key stage 4	Total including Place and Notional basic entitlement
10 Place	£25,459	£24,011	£23,377	£349,904
8 Place	£26,755	£25,307	£24,673	£290,290
5 Place	£30,643	£29,194	£28,561	£200,870

* We also pay the following contributions for PD bases: £17,510 for bases with a hydrotherapy pool and £17,723 as a supplement for schools with less than 180 pupils.

7. Risk, uncertainty and future

7.1. There is still significant uncertainty and risk within the 2026-27 budget set. This includes:

1. Pay awards and the impact of employers National Insurance contributions, VAT and business rates in the private sector

2. EHCP numbers increasing more than planned.
3. Delays with capital programmes resulting in continued use of independent provision.
4. Government policy changes, including the newly released SEND white paper.
5. EYB rates and new entitlements creating sufficiency and sustainability issues in the sector.
6. Potential for further investment where a business case demonstrates material return on that investment which supports greater inclusion and enhances the financial sustainability of the Dorset SEND system.

8. Financial Implications

8.1. As set out in this report.

9. Well-being and Health implications

9.1. None identified.

10. Climate Implications

10.1. None identified.

11. Other implications

11.1. None identified.

12. Risk Assessment

Having considered the risks associated with this decision, the level of risk has been identified as:
Current Risk: Medium
Residual Risk: Medium

13. Equalities Impact Assessment (EqIA)

13.1. There are no equalities implications arising from this report.

14. Appendices

Appendix A: Dorset 2026/27 DSG allocation after deductions
Appendix B: Dorset 2026/27 DSG proposed budget allocations

15. **Background Papers**

[DSG: technical note 2026 to 2027 - GOV.UK]

[DFE: The national funding formula for schools and high needs 2026-27]

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.

Appendix A

2026 to 2027 DSG allocations (£), after deductions for national non-domestic rates, and direct funding of high needs places by ESFA:

	Schools Block	Central School Services Block	High Needs Block	Early Years Block	Total
2026/27 - Before deducations and place funding	269,608,315	2,169,104	64,896,913	50,555,910	387,230,242
2026/27 - After deductions and place funding	266,920,887	2,169,104	59,550,913	50,555,910	379,196,814
Total deductions	- 2,687,428	-	- 5,346,000	-	- 8,033,428
Represented by:					
National Non-Domestic Rates	- 2,687,428				- 2,687,428
Academy Resourced Provision Places			- 626,000		- 626,000
Academy Special School Places			- 900,000		- 900,000
Special Free School Places			- 1,400,000		- 1,400,000
Academy Alternative Provision Places			- 380,000		- 380,000
Further Education and Independent Learning Provider Places			- 2,040,000		- 2,040,000
Total deductions	- 2,687,428	-	- 5,346,000	-	- 8,033,428

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Total Dorset 2026-27 DSG allocations

all figures before recoupment / deductions by EFSA
funding allocations as per DFE guidance published December 2025

	Schools Block	Central School Services Block (CSSB)	High Needs Block	Early Years Block	TOTAL DSG
	£	£	£	£	**£**
Schools Block - primary	129,679,179				**129,679,179**
Schools Block - secondary	134,370,401				**134,370,401**
Funding through premises factors	4,737,920				**4,737,920**
Pupil Growth & Falling rolls funding	820,815				**820,815**
CSSB		2,169,104			**2,169,104**
CSSB - historic commitments		0			**0**
HNB - DSG allocation			61,159,139		**61,159,139**
HNB - ISP and SPI			971,472		**971,472**
HNB - Special and AP schools			3,642,360		**3,642,360**
HNB - import/export adjustment			-951,000		**-951,000**
HNB - Special units and RP			75,460		**75,460**
Universal free entitlement for 3&4 year olds				12,721,093	**12,721,093**
Additional working entitlement for 3&4 year olds				7,370,476	**7,370,476**
2 year old entitlement				1,983,955	**1,983,955**
2 year old entitlement for working parents				12,462,017	**12,462,017**
Under 2's entitlement				15,336,310	**15,336,310**
Early Years Pupil Premium				431,484	**431,484**
Disability Access Fund				250,575	**250,575**
Original DSG Allocation	269,608,315	2,169,104	64,897,431	50,555,910	**387,230,760**
Addition funding:					
Mainstream Schools Additional Grant: indicative allocation					**0**
DSG Reserve					**0**
High needs additional allocation					**0**
Total funding available	269,608,315	2,169,104	64,897,431	50,555,910	**387,230,760**
Other movements:					
Block transfer	-1,348,041				**-1,348,041**
From reserve	526,410				**526,410**
Revised available funding	268,786,684	2,169,104	64,897,431	50,555,910	**386,409,129**

Proposed allocation of Dorset 2026-27 DSG funds

as consulted with or approved by Schools Forum, as necessary

	Schools Block	Central School Services Block (CSSB)	High Needs Block	Early Years Block	TOTAL DSG	
	£	£	£	£	**£**	
Allocations to Schools *excluding dedelegated items*	267,916,551				**267,916,551**	
De-delegated items:						
Trade Union facilities	7,326				**7,326**	
Free School Meals eligibility checker	7,711				**7,711**	
Termination of employment costs in schools in financial difficulty - contingency	17,151				**17,151**	
Education Functions	177,945				**177,945**	
Growth fund	360,000				**360,000**	
Falling rolls fund	300,000				**300,000**	
Growth fund - balance					**0**	
School Admissions		475,000			**475,000**	
Schools Forum		53,200			**53,200**	
Miscellaneous (not more than 0.1% of Schools Budget)		51,600			**51,600**	
Licences (ex VAT)		359,000			**359,000**	
PRC ongoing		525,400			**525,400**	
Dorset SACRE		6,000			**6,000**	
Central Services to all schools		698,904			**698,904**	
HNB - Places			24,800,500		**24,800,500**	17.94%
HNB - Placements and Direct Payments			36,302,117		**36,302,117**	26.26%
HNB - Top up payments			53,860,716		**53,860,716**	38.97%
HNB - AP & Exceptional Packages			13,526,393		**13,526,393**	9.79%
HNB - NHS support			151,245		**151,245**	0.11%
HNB - contracts and development			1,729,547		**1,729,547**	1.25%

HNB - support services			2,679,630		**2,679,630**	1.94%
HNB - recharges			0		**0**	0.00%
HNB - Other (HNB Grants)			5,176,238		**5,176,238**	3.74%
Early Years - centrally retained services				1,211,845	**1,211,845**	
Early Years - provider budgets 3&4 year olds				19,310,374	**19,310,374**	
Early Years - provider budgets 2 year olds (FRAS)				1,907,837	**1,907,837**	
Early Years - provider budgets 2 year olds (working Families)				11,983,895	**11,983,895**	
Early Years - provider budgets under 2's (working families)				14,745,910	**14,745,910**	
Early Years - Pupil Premium				431,484	**431,484**	
Early Years - Disability Access Fund				250,575	**250,575**	
Early Years - Early SEND support				300,000	**300,000**	
Early Years - Exceptional circumstances				80,000	**80,000**	
Early Years - Contingency				333,990	**333,990**	
	268,786,684	2,169,104	138,226,386	50,555,910	**459,738,084**	

Allocation of funding vs available DSG funds

	Schools Block	Central School Services Block (CSSB)	High Needs Block	Early Years Block	**TOTAL DSG overallocation of funds**
	£	£	£	£	**£**
Overallocation of funds	0	0	73,328,955	0	**73,328,955**

Dorset Council

Dorset Schools' Forum

Date of Meeting:	**27th March 2026**
Report Title:	**Update On Mainstream Schools' Funding Formula For 2026-27 In the Schools' Block**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Corporate Director:	**Jen Furnell, Director for Education and Learning**
Presenting Officer:	**Ross Bowell, Head of Service – Health, Education and SEND Commissioning** **Vanessa Eddey, Team Manager – Schools Finance & Support**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For CONSULTATION** **Under Forum power/responsibility**: 1.Consultation on formula changes including redistributions of school and early years funding
Recommendation(s):	That the Schools' Forum notes the update on the Schools' Block allocation for 2026-27
Reason for Recommendation(s):	To ensure that Schools' Forum is updated on the latest funding position for 2026-27
DECLARATIONS OF INTEREST	**Schools' Forum members are reminded of their responsibility to make a declaration of interest in any agenda item in which they have an interest, to the Chair or the Clerk, preferably in advance of the meeting.**

1. Executive Summary

This report provides an update on the mainstream schools' funding formula for 2026-27 in the Schools' Block.

2. Financial implication

2.1 BLOCK TRANSFER UPDATE: The January report to Forum advised: "To support the safety valve program, a transfer of 0.5% of the Schools' Block to the HNB has been requested through a disapplication request, equating to £1,348,041… Following the November 2025 Schools' Forum discussions, careful consideration was given to submitting the disapplication request. The concerns expressed by Schools' Forum members that schools are being asked to contribute whilst contributions by the DfE and Dorset Council are paused are understandable. Whilst school leaders' views are fully understood and respected, Dorset Council is not in a position to not request the block transfer, considering the size and risk of the HNB deficit.

Dorset Council was notified on 9th February of the closure of the Safety Valve Programme and the introduction of the High Needs Stability Grant. This was after the council was informed on 5th February of a ministerial decision to approve of the 2026-27 block transfer.

It is important to recognise that the block transfer request was based on an intention to re-establish the three-way partnership between schools, the local authority and the Department for Education to address Dorset's high needs deficit, and the High Needs Stability Grant proposition does this on a national scale by providing up to 90% contribution to the deficit as of 31st March 2026 from central government once a local authority has developed and submitted to the Department for Education a Local SEND reform plan which is then approved as meeting the required criteria.

The council fully recognises the challenges for mainstream schools and trusts in delivering balanced budgets while providing high-quality, inclusive education. In support of this, the council has provided a large increase in high needs block funding to mainstream schools from less £5m per year in 2022-23 to a forecast of £20m+ per year in 2026-27 while the total contribution from the Schools' Block to the HNB over that period is £3.03m.

2.2 FINAL SCHOOLS BLOCK VALUES: Officers used the Forum's preferred option of reducing basic entitlement only, rather than reducing both basic entitlement and the minimum funding guarantee, to prepare the Authority Proforma Tool (APT). The submission has been approved as compliant by DfE.

The 2026-27 Schools Block funding rates for Dorset are shown below with the 2025-26 rates for comparison, noting that the 2025-26 Schools Budget Support Grant (SBSG) and National Insurance Contribution (NICs) Grants have been rolled in to the Schools Block in 2026-27.

	2025-26	2026-27	Diff	% Diff
Basic Entitlement				
Primary	£3,847	£4,033	£186	4.84%
KS3	£5,422	£5,643	£221	4.07%
KS4	£6,113	£6,361	£248	4.06%
Minimum per pupil funding				
Primary	£4,955	£5,115	£160	3.23%
Secondary	£6,465	£6,640	£175	2.71%
Deprivation				
Primary FSM	£495	£505	£10	2.02%
Secondary FSM	£495	£505	£10	2.02%
Primary FSM6	£1,060	£1,210	£150	14.15%
Secondary FSM6	£1,555	£1,725	£170	10.93%
Primary IDACI A	£685	£700	£15	2.19%
Primary IDACI B	£520	£530	£10	1.92%
Primary IDACI C	£490	£500	£10	2.04%
Primary IDACI D	£445	£455	£10	2.25%
Primary IDACI E	£285	£290	£5	1.75%
Primary IDACI F	£235	£240	£5	2.13%
Secondary IDACI A	£950	£970	£20	2.11%
Secondary IDACI B	£745	£760	£15	2.01%
Secondary IDACI C	£695	£710	£15	2.16%
Secondary IDACI D	£635	£650	£15	2.36%
Secondary IDACI E	£450	£460	£10	2.22%
Secondary IDACI F	£340	£345	£5	1.47%
Low Prior Attainment				
Primary LPA	£1,175	£1,200	£25	2.13%
Secondary LPA	£1,785	£1,825	£40	2.24%
English as an Additional Language				
Primary EAL	£595	£610	£15	2.52%
Secondary EAL	£1,595	£1,630	£35	2.19%
Mobility				
Primary Mobility	£965	£985	£20	2.07%
Secondary Mobility	£1,385	£1,415	£30	2.17%
School-Led Funding				
Lump Sum	£145,100	£152,700	£7,600	5.24%
Sparsity				
Primary Sparsity	£57,400	£58,600	£1,200	2.09%
Secondary Sparsity	£83,400	£85,200	£1,800	2.16%
Premises				
Split Site	£81,000	£82,700	£1,700	2.10%

3. Well-being and Health implications

Not applicable

4. Climate Implications

Not applicable

5. Risk Assessment

Having considered the risks associated with this decision, the level of risk has been identified as:
Current Risk: LOW
Residual Risk: LOW

6. Equalities Impact Assessment (EqIA)

Not applicable

7. Appendices

Not applicable

8. Background Papers

Dedicated Schools Grant: Dedicated schools grant (DSG): 2026 to 2027 - GOV.UK

Schools Operational Guidance: Schools operational guide: 2026 to 2027 - GOV.UK

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.

Dorset Council

Dorset Schools' Forum

Date of Meeting:	**27 March 2026**
Report Title:	**Annual Review of Schools' Forum Constitution and Election Procedure**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Corporate Director:	**Jen Furnell, Corporate Director Education & Learning**
Report Author: Title: Tel: Email:	Tom Easterbrook Schools Forum Officer 01305 224567 tom.easterbrook@dorsetcouncil.gov.uk
Presenting Officer:	Tom Easterbrook, Schools Forum Officer, Schools Finance and Support, People – Children Directorate
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For CONSULTATION** **Under Forum power/responsibility**: 2(g) Schools' Forum membership issues.
Recommendation(s):	Maintain the constitution of the Forum as currently drafted to protect against falling numbers on roll, thus ensuring the widest possible array of views contributes to the work of the Forum (see Appendix A) The cap on the number of representatives from each academy trust introduced from 1st September 2020 be updated in line with academy conversions (see Appendix B Adopt proposed timelines for the election of Maintained Headteacher and Academy Representatives to ensure they can take up their seats in September 2026(see Appendix C) Forum members note the forthcoming election of chair and Vice chair and submit any nominations to the clerk no later than 26th June 2026
Reason for Recommendation(s):	To ensure continuous arrangements are in place for the Council to consult with a legally constituted body over decisions relating to the Schools' Budget as required by the School Standards and Framework Act 1998 and the Schools' Forum (England) Regulations 2012. To ensure academies and maintained schools are treated equally, and that the broadest possible spectrum of views of schools are represented at Schools' Forum meetings. To mitigate the risk to the smooth functioning of the Dorset Schools' Forum as it cannot conduct business without a chair or vice-chair in post. Should no

	members come forward, it is not possible under the regulations for officers to take these posts.
DECLARATIONS OF INTEREST	**Schools' Forum members are reminded of their responsibility to make a declaration of interest in any agenda item in which they have an interest, to the Chair or the Clerk, preferably in advance of the meeting.**

1. Executive Summary

1.1 Review of Constitution

A review of the Dorset Schools' Forum Constitution is undertaken annually to make sure the legislative principles under the Schools' Forum (England) Regulations 2012 as amended by the School and Early Years Finance (England) Regulations continue to be observed. Numbers of seats to which each sector is entitled are adjusted annually as appropriate based on the prior October School Census.

The legislation makes clear that following sectors be accounted for within the makeup of a Schools' Forum:

a) primary schools, middle schools, secondary schools and academies must be broadly proportionately represented on schools' forums, having regard to the total numbers of pupils registered at them.

b) schools' members and academies members must together comprise at least two thirds of the membership of the forum.

c) where the authority maintains one or more maintained special schools, at least one schools' member must be a representative of a maintained special school;

d) where the authority maintains one or more learning centres, at least one schools' member must be a representative of a learning centre;

e) the authority must appoint non-schools members comprising at least one person to represent early years providers, at least one person to represent post 16 providers, and may also appoint additional non-schools members to represent the interests of other bodies including trades unions, the Church of England and Roman Catholic dioceses in their area, and, where there are schools or academies in the area with a different religious character, the appropriate faith group.

f) Schools' forums must have at least one member representing any special academies and at least one member representing alternative (AP) academies in a local authority's area.

The outcome of this year's review is attached at Appendix A. Although the review indicates that the number of school member places should be reduced from 15 to 14 the Schools Forum Operational Guide states that "Authorities will wish to take various issues into account in deciding the actual size, including the need to have full representation for various types of school". The Authority feels it is important to ensure that the good balance of views isbrought to bear by the existing structure of School Members is maintained as Forum continues to grapple with complex challenges such as high needs funding and falling rolls.

.

The voluntary agreement to balance academy seats by phase will continue. While this is a statutory requirement when considering maintained representatives, the regulations do not set the same stipulation for academies.

On non-school members We propose no changes.

Term of Office and Mid-Cycle Appointments
As part of this year’s review, Forum is invited to consider revisions to both the length of member terms and the treatment of mid-cycle appointments. The current two-year term often results in members developing expertise only towards the end of their tenure, leading to frequent reappointments and increased administrative effort. To strengthen continuity and ensure members have adequate time to engage with the increasing complexity of Forum business, the Authority proposes extending all terms of office to four years, aligning with standard school governance practice.

Forum is also asked to review the current approach to mid-cycle appointments. At present, members appointed part-way through a cycle serve only the remainder of the existing term. This can lead to disproportionately short service and limits the opportunity to build the knowledge required to contribute fully.

To ensure fairness and consistency, it is proposed that any member appointed mid-cycle is offered a full four-year term, with the usual option to resign earlier should circumstances require.

Forum is invited to discuss these proposals.

Academy representation
There are 14 academy trusts operating in Dorset, including single converters (for more detail see Appendix B). It was agreed in the March 2020 meeting that a cap on academy seats per academy trust be applied. This should reflect the proportion of the Dorset academy pupil population attending the academy trust.

Appendix B proposes the cap to be applied for 2062- to ensure the cap remains proportionate accounting for new academy conversions. Whilst most Dorset academy trusts would be restricted to one seat, there are 3 trusts where the cap be set at 2 seats.

The decision whether to introduce a restriction needs to be balanced against the difficulties always encountered recruiting academy representatives and engaging academy trust boards in the recruitment process.

Maintained Headteacher and Academy Representative Election
The biannual election of Maintained Headteacher and Academy Representatives is proposed to take place in line with the timeframe set out in Appendix C. The results will be shared at the next meeting in July 2026. Should no nominations be received, or vacancies remain after the closure of nominations, officers would seek to appoint eligible colleagues in line with the regulations.

Election of Chair & Vice Chair
In accordance with the Schools’ Forum Working Practice, the Chair and the Vice Chair are elected at the last meeting of each calendar year, and re-elections are due at the next meeting in July.

Re-election of the same person on successive occasions is at the discretion of the Schools’ Forum.

Nomination and voting procedures for both positions are attached at Appendix D, and elections will take place at our next meeting on 3rd July 2026

The core duties and responsibilities of Chair are as set out on page 2 of Appendix D, the Vice being required to deputise as necessary.

2. Financial Implications

None

3. Climate Implications

n/a

4. Other implications

Not Applicable

5. Risk Assessment

Having considered the risks associated with this decision, the level of risk has been identified as:
Current Risk: low
Residual Risk: low

This is a legislative issue in relation to the constitution of Schools' Forum which requires us to ensure that continuous arrangements are in place for the Council to consult with a legally constituted body over decisions relating to the Schools' Budget as required by the School Standards and Framework Act 1998 and the Schools' Forum (England) Regulations 2012, as amended

6. Equalities Impact Assessment (EqIA)

Not Applicable

7. Appendices

Appendix A: Annual Review of the Dorset Schools' Forum Constitution 2024

Appendix B: Proposed cap on occupation of seats by Dorset academy trusts from September 2024

Appendix C: Deadlines for election of maintained Head Teacher and Academy representatives to take up seats from September 2024

Appendix D: Voting and Nomination Procedures for the Election of Chair & Vice Chair

8. Background Papers

Schools' Forum (England) Regulations 2012 as amended by subsequent School and Early Years Finance (England) Regulations

DfE Schools' Forum Operational and Good Practice Guide (March 2021)

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.

SCHOOLS' FORUM CONSTITUTION - 2026							Apendix A
Type of Mainstream School	**Pupil NOR @Oct25**	**% NOR per school type**	**Indicative Members per NOR**	**HTs**	**Govs**	**Total Members**	
Primary maintained	5281	11.68%	1.635129158	2	1	3	
Secondary maintained (incl middles)	7685	17.00%	2.379467445	2	1	3	
Primary academies	15324	33.89%	4.744692144			4	
Secondary academies (incl middles)	16154	35.73%	5.001680821			5	
All through academies	772	1.71%	0.239030432			0	
Total	**45216**	**100.00%**	**14**			**15**	

Maintained special schools			1			1
Academy special schools			1			1
Maintained learning centres			1			1
Academy learning centres			1			1
Total Schools' Members			**18**			

Non Schools' Members			**Members with effect from Sep 2026**
1 DTSC (Dorset Teachers & Support Staff Council)			1
Early Years: 1 private/childminder/independent + 1 voluntary/governor managed/maintained			2
Post-16 provider of SEND education			1
Diocese			0
Executive Portfolio Holder for Children, Education and Early Help			0
Executive Portfolio Holder for Finance, Commercial and Assets			0
Total Non Schools' Members			**4**
Grand Total Schools & Non Schools			**22**

Schools' Members %			81.8%	(min 2/3rds)

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Apendix B

Total Academy Seets **8**

Trust Name	No. of Schools	Number on Roll	% of Academy Pupils	Forum Seats as % of NOR	Proposed Cap
Wessex Multi Academy Trust	12	6,058	18.91%	1.5128	2
Initio Learning Trust	17	5,829	18.20%	1.456	2
Sherborne Area Schools' Trust	17	5,281	16.49%	1.3192	2
Diocese Of Salisbury Academy Trust	15	2,575	8.04%	0.6432	1
Aspirations Academies Trust	3	2,433	7.60%	0.608	1
Hamwic Education Trust	7	1,938	6.05%	0.484	1
Authentic Education Group Limited	2	1,577	4.92%	0.3936	1
Southern Education Trust	5	1,498	4.68%	0.3744	1
Coastal Learning Partnership	8	1,060	3.31%	0.2648	1
The Heath Academy Trust	6	838	2.62%	0.2096	1
Plymouth Cast	6	812	2.54%	0.2032	1
Pickwick Academy Trust	6	779	2.43%	0.1944	1
The First Federation Trust	6	669	2.09%	0.1672	1
Education Swanage Limited	1	354	1.11%	0.0888	1
Kingston Maurward Studio School Limited	1	330	1.03%	0.0824	1
TOTAL	**112**	**32,031**	**100.00%**		

Reference:

Total All Pupils (All Schools): 46,344

Deadlines for election of Maintained Headteacher and Academy Representatives 2025

In the absence of any association arrangements, the Local authority will run elections in accordance with the following timeframe for Maintained Headteacher and Academy representatives.

Monday, 27th April 2026: Nominations invited.
Monday, 18th May 2026 at 5pm: Deadline for nominations.

Where nominations do not exceed the number of seats available:

Tuesday, 19th May 2026: Applicants confirmed as members from Sept 26.

Where nominations exceed the number of seats available:

Monday, 1st June 2026: Voting window opens.
Monday, 22nd June 2026 at 5pm: Deadline for casting votes.

Tuesday, 23rd June 2026: Successful applicants confirmed as members from Sept 25.

Friday, 3rd July 2026: Appointments reported to Schools' Forum.

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Dorset Council

Dorset Schools' Forum

Nomination and Voting Procedure for the election of Chair and Vice Chair

1. The Dorset Schools' Forum Constitution and Working Practice states that the Chair and Vice Chair of the Schools' Forum will be elected at the last meeting of the academic year, taking up office with effect from the first meeting of the following academic year.

2. Furthermore, the Chair and Vice Chair must be members of the Schools' Forum, and the same person may be re-elected on successive occasions at the discretion of Forum members. In making such a decision forum should consider succession planning

3. Nominations may be made in favour of any Forum member by all members of the Forum equally, and each nomination should have the support of 2 members of the Forum.

4. The Clerk will ascertain whether nominees are willing to accept nominations and will inform them of all other members who have been nominated before they decide whether to accept the nomination as this may affect their decision.

5. Nominations should be sent to Tom Easterbrook, Clerk to the Schools' Forum, People - Children Directorate by email to tom.easterbrook@dorsetcouncil.gov.uk by the close of business on **Friday, 26th June 2026.**

6. Nominations may be made on the attached form or sent by email if the email originates from one member, is forwarded to another member to confirm the nomination, and then forwarded by this second member to the Clerk (tom.easterbrook@dorsetcouncil.gov.uk).

7. If only one nomination is received for one or other position and accepted by the nominee; that person will be appointed Chair or Vice Chair.

8. If no nominations are received or accepted prior to the closing date, nominations will be accepted at the meeting held on the 3rd July 2026.

9. If more than one nomination is received and accepted for either position, an election will be held by a show of hands at the meeting held on the 3rd July 2026.

Any queries in relation to the nomination and voting procedures should be directed to Tom Easterbrook, Clerk to the Dorset Schools' Forum on 01305 224567 or by email to tom.easterbrook@dorsetcouncil.gov.uk.

Nomination for position of Chair or Vice Chair of Dorset Schools' Forum

We,

(Name 1)……………………………….. Signature…………………………….

(Name 2)……………………………….. Signature …………………………….

Nominate (name) ……………………………………. ….

as Chair / Vice Chair* of the Dorset Schools' Forum for the period September 2024 to August 2025 (*delete whichever does not apply).

Core duties and responsibilities of Chair and Vice Chair when deputising:

- Chairing meetings of the Dorset Schools' Forum including playing a key role in setting the tone, pace and overall dynamic of meetings; providing an environment within which all members can contribute fully to discussions; and guiding the Forum to making well informed decisions.
- Making the casting vote in the event of a tie.
- Leading at Forum pre-meetings with senior officers of the Local Authority to agree agenda items in accordance with agreed timelines. The Chair ensures that the substance of agenda items is clear and that all the issues are clearly understood, including what decisions and/or actions need to be taken in respect of Forum business.
- Being an executive member of the Strategic Alliance for Children & Young People.
- Attending relevant consultative or management groups, along with national and regional conferences relevant to the work of schools' forums;
- Presenting Forum views on specific issues to officers and elected members of the Local Authority, including suggestions for improvements in the way business is conducted, deferral of items until further information is available to enable a decision to be made, and requests for training;
- Dealing with correspondence and technical queries with the support of the Forum Clerk and the People – Children Directorate School Funding Team.

Please return this form to Tom Easterbrook, Clerk to the Schools' Forum, People - Children Directorate by email to tom.easterbrook@dorsetcouncil.gov.uk. **by the close of business on Friday, 27th June 2025 at the latest.**

Dorset Schools' Forum

Date of Meeting:	**27 March 2026**
Report Title:	**Dedicated Schools' Grant (DSG) Monitoring 2025-26 (Q3)**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Corporate Director:	**Jen Furnell, Corporate Director for Education & Learning**
Report Author: Title: Tel: Email:	Hannah Chapple Senior Accountant - Finance 01305 224454 Hannah.Chapple@dorsetcouncil.gov.uk
Presenting Officer:	**Steve Gorson – (Service Manager – Childrens Finance)**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For INFORMATION** **Under Forum power/responsibility**: ___ 4 (a) (i) acting as the conduit for information relating to Children's Services budgets, and particularly schools' and early years' funding, for relevant colleagues in schools and early years settings, to ensure the work of the Schools' Forum becomes a central part of the local education context.
Recommendation(s):	• To note the DSG Q3 2025-26 position
Reason for Recommendation(s):	To inform School's Forum of the latest DSG position and the reasons for the position.
DECLARATIONS OF INTEREST	**Schools' Forum members are reminded of their responsibility to make a declaration of interest in any agenda item in which**

	they have an interest, to the Chair or the Clerk, preferably in advance of the meeting.

1. **Executive Summary**

2. This report covers:

    1. The Dedicated Schools Grant context, including the statutory override
    2. The financial position of Dorset's DSG as at December 2025
    3. Individual Schools Budget (ISB) Spring Outturn Forecast for 2025-26
    4. Early Years and Central School Services blocks

3. <u>Context</u>

4. The Dedicated School Grant (DSG) is a ring-fenced grant of which the majority is used to fund individual school budgets in local authority maintained schools and academies in Dorset, early years nursery entitlement and provision for pupils with high needs, including those with Education Health & Care Plans (EHCPs) in special schools, special provision and mainstream schools in Dorset and out of county. Part of the DSG, the Central Services Schools Block (CSSB) provides funding for Dorset Council to carry out central functions on behalf of pupils in state-funded maintained schools and academies in England.

5. There are four blocks within the DSG: Schools Block (SB – including Individual Schools Budgets), Early Years Block (EYB), High Needs Block (HNB) and Central Services Schools Block (CSSB).

6. The cumulative DSG deficit, at the 31 March 2025 was £95.63m (31 March 2024 the total was £59.6m) with a forecast cumulative deficit reaching £150.261m by 31 March 2026. The following three paragraphs detail how local authorities currently account for the cumulative deficit until March 2028, when the deficit becomes a local authority general fund issue.

7. Any deficit associated with the DSG is kept off councils' balance sheets because of the statutory override set out in The Local Authorities Capital Finance and Accounting (England) Regulations. This was extended from March 2026 to March 2028 in June 2025.

8. Until March 2028 the deficit is therefore held separately from the general fund, however, there remains an underlying cashflow pressure from carrying a £150m deficit meaning that the Council has access to £150m less cash than it would otherwise. As a result, interest foregone during 2025/26 on the deficit equates to £4.9m of pressure met by the General Fund. This is £4.9m which could otherwise be spent on local service delivery.

9. As the deficit grows, there will come a point at which it exceeds Council reserves, and the Council would be technically insolvent. However, the government announced a two-year extension to the statutory instrument in June 2025, and have recently announced the DSG Deficit Grant which could see up to 90% of the deficit as at 31 March 2026 provided for. However, it is not yet clear what will be required in order to qualify for this grant, this work is ongoing. These commitments from the government should mean the future risk is lowered.

10. DSG Quarter 3 position

11. At the 31 December 2025, the forecast outturn is a £55.945m overspend for 2025/26 (Appendix A). Adding the historic cumulative deficit position, a revised cumulative deficit would be £150.261m. This figure reflects the withholding of DfE contributions which will no longer be received as the Safety Valve Programme is ending with effect from 1 April 2026. Safety Valve payments will be replaced by the new deficit grant.

12. The outturn position for 2024-25 was a £37.3m overspend.

13. The overspend is mainly within the High Needs Block (£54.97m) although there is an overspend in the Early Years Block (£0.93m), regarding an income accrual estimation made at the end of 2024/25. There is also a £0.04m overspend in the Central School Services Block regarding licences.

14. Appendix A provides a summary of the forecast variance position and Appendix B provides an end of year position against the agreed 'Safety Valve' position.

15. 'Safety Valve' agreement

16. The 'Safety Valve' is a DfE programme where the local authority has agreed to develop a revised DSG Deficit management plan to achieve a sustainable financial position for the DSG budget. In return, the DfE will provide the local authority with additional funds as set out in the published plan. Agreements run for around five years and there are currently 34 local authorities in the programme and are published online.

17. Dorset Council signed a £42m 'Safety Valve' agreement with the Department for Education in March 2022 to help eradicate the cumulative DSG deficit and support a return to a balanced in-year DSG position by 2026-27. Dorset Council will contribute £33m as part of the agreement. Additionally, Dorset are investing £47m into capital schemes across the county.

18. To date, the DfE funding received totals £23.75m and Dorset Council contributions equal £15m. As at the 31 December 2025, no DfE contributions for 2023-24, 2024-25 or 2025-26 have yet been received. Dorset Council maintain a separate reserve totalling £12.9m to support the Safety Valve programme.

19. As a result of the financial position the Department for Education (DfE) continue to have conversations with Dorset Council, including a site visit by the DfE SEND Advisor culminating in a request to produce another revised plan. A revised plan was submitted to the DfE on the 12 September 2025.

20. This recovery plan is part of the Council's Enhanced Monitoring and Support programme and is supported by DfE advisors.

21. The DfE responded on the 20 October 2025 noting 'Advisers noted the innovative and robust approaches you have in place to meet the needs of CYP with SEND' and requested three areas that may need further consideration.

22. On 9 February 2026, the High Needs Stability Grant was announced. This outlined proposals for central government to provide a grant to cover up to 90% of the High Needs-related DSG deficit to 2025/26.

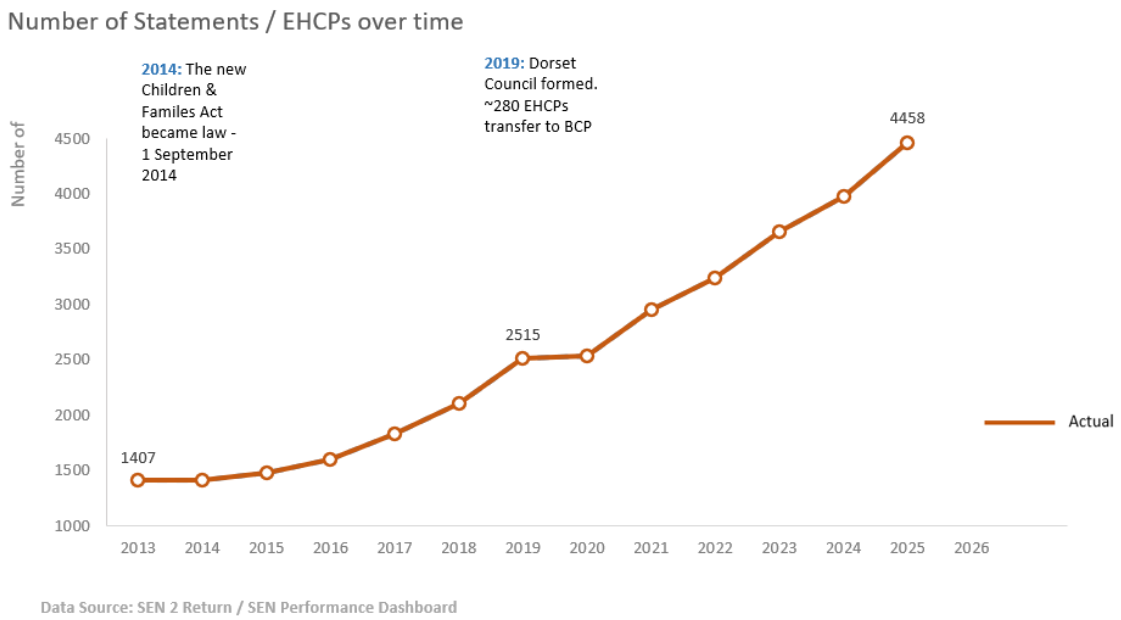
23. Each Local Authority is required to submit a Local SEND Reform Plan and this plan requires secretary of state for education approval prior to any grant being made available.

24. First drafts of the Local SEND Reform Plans are due by 19th June 2026

25. This remains a prominent and well documented national issue.

26. <u>High Needs Block</u>

27. A significant driver for the historic deficit is the continued rise in the number of children and young people who require an Education, Health, and Care Plan (EHCP). Chart 1 demonstrates this growth since the introduction of the SEND reforms introduced in 2014.



28. CHART 1: Number of pupils with an EHCP since 2013

29. There has been a notable increase in Independent Special School Placements, with current forecasts indicating 307 FTE at an average cost of £66,300. This compares to the budgeted 261 FTE at £74,000. Although the average unit cost is lower than anticipated, the higher volume of placements is contributing to a projected overspend on Independent Special School Placements of £1.9m.

30. The High Needs Block (HNB) budget for financial year 25/26 was set with a starting in-year deficit of £51.11m. The majority of the movement from this starting deficit to the current overspend position of £54.97m is the forecast position on Independent Special School Placements mentioned above.

31. Personal budgets and Alternative Provision pressures contribute to a further £1.0m of the overspend position as indicated by the AP tracker kept by the brokerage team.

32. A new EHCP database, Synergy Case Management, was implemented on 7th May 2025. Due to delays with reporting and data cleansing, EHCP data as at the end of December is currently unavailable. This has now been added to Dorset Council's central risk register

33. Early Years Block

34. The Early Years Block entitlements are:

- The 15 hours entitlement for eligible working parents of children from 9 months up to 2 years old (due to be extended to 30 hours from 1 September 2025)
- the 15 hours entitlement for eligible working parents of 2-year-old children (due to be extended to 30 hours from 1 September 2025)
- the 15 hours entitlement for families of 2-year-olds receiving additional support (formerly known as the 2-year-old disadvantaged entitlement)
- the universal 15 hours entitlement for all 3 and 4-year-olds
- the additional 15 hours entitlement for working parents of 3 and 4-year-olds

35. The Early Years Block has significantly increased in funding because of new entitlements and changes. Risks within the sector include deliverability of the new entitlements and (including financially) understanding and predicting the demand for the new or extended entitlements.

36. The Early Years Block is forecast to overspend by £0.934m. This is due to an assumption, based on data from the previous financial year, that Dorset Council would receive more funding than transpired. This is a timing issue, rather than an overspend on the Early Years Block and relates to the reported year end surplus that formed part of overall DSG position at the end of 2024-25. The Early Years Block has seen a 75% increase in 25/26 due to government initiatives to offer 30-hour free childcare for under 2-year-olds. The DfE collect termly data on the new entitlements to ensure funding is adjusted to reflect actual take-up, but these adjustments take place in the following financial year and have to be estimated at year end.

37. Central Schools Services Block

38. There is a forecast overspend of £0.04m within the CSSB for National Copyright Licences.

39. DfE has agreements with nine agencies, for example the Motion Picture Licensing Company, to purchase a single national licence managed by DfE for all state funded schools in England.

40. This means Local authorities and schools do not need to negotiate individual licences. DfE pays the cost to the agencies and provides this as a service to local authorities at a charge.

41. The overspend is the difference between the CSSB allocation for Licences within the DSG, and the actual DfE negotiated price.

1. Well-being and Health implications

Provision for children with SEND is a statutory duty and includes provision for their wellbeing and health implications.

Effective school provision is part of the wider provision for supporting the health and wellbeing of children and young people.

2. Climate Implications

None

3. Other implications

None

4. Risk Assessment

Having considered the risks associated with this decision, the level of risk posed by the DSG overspend has been identified as:

Current Risk: High
Residual Risk: Medium

This is dependent on effective management of the DSG HNB and EYB.

5. Equalities Impact Assessment (EqIA)

The provision of education for children and young people is an essential part of tackling equalities issues. The council has a strategic role in promoting equality through its work for children with SEND.

6. Appendices

Appendix A: Total Dorset DSG forecast variance

Appendix B: Dorset's Cumulative DSG Position

Appendix E: Mean average costs

Appendix F: Forecast DSG spend 2025-26

7. Background Papers

[Dorset SV agreement (publishing.service.gov.uk)]

Footnote:

Issues relating to financial, legal, environmental, economic and equalities implications have been considered and any information relevant to the decision is included within the report.

Total Dorset DSG forecast variance - December 2025

	Schools Block	Central School Services Block (CSSB)	High Needs Block	Early Years Block	**TOTAL FORECAST VARIANCE**
	£	£	£	£	**£**
Individual Schools budgets	0				**0**
Growth fund	0				**0**
De-delegated budgets	0				**0**
School Admissions		31,971			**31,971**
Schools Forum		4,758			**4,758**
Miscellaneous (not more than 1% of Schools Budget)		0			**0**
Licences		-82,996			**-82,996**
PRC ongoing		6,516			**6,516**
Dorset SACRE		0			**0**
Central services to all schools		0			**0**
HNB - overspend identified at budget setting			-51,107,820		**-51,107,820**
HNB - Places			-1,519,404		**-1,519,404**
HNB - Placements and Direct Payments			-2,479,214		**-2,479,214**
HNB - top up payments			830,080		**830,080**
HNB - Bespoke packages			-985,462		**-985,462**
HNB - NHS support			44,440		**44,440**
HNB - Contracts and development			-33,322		**-33,322**
HNB - hearing and vision support service			-16,877		**-16,877**
HNB - specialist teaching			122,622		**122,622**
HNB - physical and medical service			19,340		**19,340**
HNB - portage			42,069		**42,069**
HNB - complex communications			0		**0**
HNB - other			112,679		**112,679**
HNB - Recharges			0		**0**
					0
Early Years - 3&4 year old Universal and additional hours				-45,353	**-45,353**
Early Years - 2 Year old - Disadvantaged				0	**0**
Early Years - 2 year olds - Working Families				20,389	**20,389**
Early Years - Under 2s				-909,174	**-909,174**
Early Years - Early Years Pupil Premium				0	**0**
Early Years - Disability Access Fund				0	**0**
Early Years - Central rentention				0	**0**
Early Years - Exceptional circumstances				0	**0**
Early Years - Early SEND support				0	**0**
Early Years - Contingency				0	**0**
	0	-39,751	-54,970,869	-934,138	**-55,944,758**

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Dorset's Cumulative DSG Position - December 2025

Table 1: Dorset's revised DSG Position

		£	£	£
Opening DSG Cumulative Deficit (1 April 2023)		35,918,172		
Add: All years 'Safety Valve' DfE funding received		23,750,000		
2023-24 DSG In-year overspend		23,655,314		
2024-25 DSG In-year overspend		37,288,452		
2025-26 DSG In-year overspend		55,944,758		
DSG Cumulative Deficit (31 March 2026)			176,556,696	
Dorset Council 2023-24 contribution		-		
Dorset Council 2024-25 contribution		-		
Dorset Council 2025-26 contribution				
Schools Block transfer 2024-25	-	1,231,990		
Schools Block transfer 2025-26	-	1,313,318		
Revised DSG Deficit (for 'Safety Valve' monitoring reporting)			**174,011,388**	
DfE ‘Safety Valve’ 2021-22 contribution	-	17,500,000		
DfE ‘Safety Valve’ 2022-23 contribution	-	6,250,000		
DfE ‘Safety Valve’ 2023-24 contribution		-		
DfE ‘Safety Valve’ 2024-25 contribution		-		
DfE ‘Safety Valve’ 2025-26 contribution		-		
Forecast closing DSG cumulative deficit (31 March 2026)				**150,261,388**
Outstanding DFE and DC contributions				36,287,000

Table 2: Required DSG position versus actual DSG position

Required DSG Deficit (for 'Safety Valve') 2025-26	42,099,501
Actual DSG Deficit (as Table 1)	174,011,388
Over the required 'Safety Valve' DSG Deficit	**131,911,887**

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Total Dorset DSG forecast - December 2025

	Schools Block £	Central School Services Block (CSSB) £	High Needs Block £	Early Years Block £	**TOTAL FORECAST £**
Individual Schools budgets	75,115,515				**75,115,515**
Growth fund	468,934				**468,934**
De-delegated budgets	225,466				**225,466**
School Admissions		443,029			**443,029**
Schools Forum		49,942			**49,942**
Miscellaneous (not more than 1% of Schools Budget)		51,600			**51,600**
Licences		357,996			**357,996**
PRC ongoing		506,184			**506,184**
Dorset SACRE		10,000			**10,000**
Central services to all schools		781,057			**781,057**
HNB - Places			20,741,570		**20,741,570**
HNB - Placements and Direct Payments			31,864,707		**31,864,707**
HNB - top up payments			42,689,220		**42,689,220**
HNB - Bespoke packages			10,036,239		**10,036,239**
HNB - NHS support			168,868		**168,868**
HNB - Contracts and development			1,213,413		**1,213,413**
HNB - hearing and vision support service			897,861		**897,861**
HNB - specialist teaching			764,378		**764,378**
HNB - physical and medical service			82,440		**82,440**
HNB - portage			571,681		**571,681**
HNB - complex communications			0		**0**
HNB - other			661,538		**661,538**
HNB - Recharges			206,926		**206,926**
Early Years - provider budgets 3&4 year olds				19,585,729	**19,585,729**
Early Years - provider budgets 2 year olds				10,991,074	**10,991,074**
Early Years - under 2s				15,015,933	**15,015,933**
Early Years - SEND support				567,967	**567,967**
Early Years - centrally retained services				1,174,268	**1,174,268**
Early Year - disability access fund				232,624	**232,624**
	75,809,915	2,199,808	109,898,841	47,567,595	**235,476,159**

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