



Schools' Forum

Date: Friday, 3 July 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 Vanessa Eddey on 01305 225918 or by email to vanessa.eddey@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

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|--|---------|
| 1. APOLOGIES FOR ABSENCE AND VACANCIES | |
| To receive any apologies for absence, noting current vacancies. | |
| 2. DECLARATIONS OF INTEREST | |
| To receive any declarations of interest. | |
| 3. MINUTES AND ACTIONS FROM THE PREVIOUS MEETING | 3 - 14 |
| To confirm the minutes of the meeting held on 27 th March 2026, raise any matters arising, review the Action Log, and note any correspondence received. | |
| 4. WORK OF SCHOOLS' FORUM 2026/27 | 15 - 24 |
| To elect a chair and vice chair | |

To confirm seats following elections
To confirm dates of future meetings

To consider a report from:

Vanessa Eddey, Team Manager, Schools, Finance and Support

Items for Consultation

5. **HIGH NEEDS ALLOCATIONS FUNDED BY BLOCK TRANSFER** 25 - 34

To consider a report from:

Ellen Eager, Sufficiency and Funding Manager, Health, Education & SEND Commissioning

Items for information

6. **DEDICATED SCHOOLS' GRANT (DSG) OUTTURN 2025-26** 35 - 58

Outturn position for 2025-26

Individual Schools Budget Outturn Position 2025-26

To consider a report from:

Lee House, Acting Head of Finance, Business Partnering

Vanessa Eddey, Team Manager, Schools, Finance and Support

7. **SEND REFORM UPDATE**

Verbal update from:

Jen Furnell, Corporate Director, Education & Learning

8. **FUNDING FORMULAE FOR 2027-28: TIMETABLE FOR CONSULTATION** 59 - 108

To consider a report from:

Ross Howell, Head of Service – Health, Education and SEND Commissioning

9. **ANY OTHER BUSINESS**



SCHOOLS' FORUM

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

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

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

31. Apologies for Absence and Vacancies

The Chair opened the meeting and invited the Clerk to present any apologies received. The Forum noted apologies from Brian Boyes, Giles Pugh, and Paul Lavis.

The Clerk also informed Members that Dani Mark, Early Years representative, had formally resigned from the Forum. An election process to fill the vacancy had already been launched prior to the meeting and was due to conclude at 5:00pm later that day. At the time of the meeting, one nomination had been received.

No further apologies or membership updates were raised.

32. Declarations of Interest

None

33. Minutes and Actions from the Previous Meeting

The Chair invited Members to comment on the accuracy of the minutes from the previous meeting. No amendments were requested, and the minutes were approved as an accurate record

The Clerk then updated Members on the status of the Action Log. He apologised that an unfiltered version had been circulated in error due to last-minute changes when preparing papers. This had included a number of previously closed actions, which had understandably caused some confusion

The Clerk confirmed that the remaining open SEND-related actions were intended to be picked up through the High Needs Block workshop scheduled for late April, and that it would therefore be more practical to address them collectively rather than separately at this meeting.

He offered to circulate written updates, including on hospitality and gifts, and invited Members to contact him by email with any queries arising
Members agreed to defer discussion of remaining actions, pending the Clerk's written update and the upcoming workshop.

34. Pupil Growth Applications For 2026-2027

Three applications for Pupil Growth funding were considered for the 2026–27 financial year. Each proposal related either to ongoing bulge-year commitments or to capacity pressures in areas where demand continues to exceed available places.

Wimborne First School

The Forum reviewed the continuing need to support the bulge cohort created in 2022. Numbers remain above the point at which mixed-age organisation would be feasible. For April–August 2026, 11 places fall below the minimum funding threshold, with a further 8 places requiring support between September 2026–March 2027, generating a total request of £42,482 (£42,343). This represents the final full year of support for this particular cycle.

No concerns were raised.

Beaminster St Mary's Academy

Pressure across the local area continues to affect the cohorts that prompted additional capacity from 2024. Nearby schools remain full, making it necessary to retain the additional class. The school requires funding for 6 places (Apr–Aug 2026) and 9 places (Sept 2026–Mar 2027), amounting to £39,776. (£38,339)

Questions were raised about historic class configurations shown in the papers, and it was clarified that these reflected internal organisation rather than funded growth.

Ferndown First School

Demand in this part of the county continues to rise despite wider falling-roll patterns. As a result, support is required for both existing bulge cohorts and the creation of an additional Reception class from September 2026. The application included:

1 place requiring support from April–August 2026,
13 places across Years 1 and 3 from September 2026–March 2027, and
Start-up and place funding for a new Reception class, reflecting the need for extra capacity across the local area.

These elements together total £117,525 (£113,564). Without this expansion, significant numbers of children living in the locality would be unable to secure a place, as neighbouring schools are also projected to be full.

On the duration of support. It was explained that there is an incoming cohort of around 90 pupils makes a drop below viability unlikely during the primary phase.

Discussion and Decision

Across all three cases, the Forum recognised that the relevant areas—particularly Wimborne and Ferndown—continue to experience demographic patterns that differ from the wider Dorset picture. It was also confirmed that alternative schools do not have sufficient space to absorb the excess demand.

Members were advised that each request meets the criteria for Pupil Growth funding, although small administrative adjustments may be required due to recent updates to calculation tools. **(These final amounts have been calculated since this meeting; final figures are included in red above)**

Outcome:

Applications for Wimborne First, Beaminster St Mary's, and Ferndown First were approved unanimously.

35. High Needs Block Budget Setting 2026-27

The Forum received an update on the projected High Needs Block (HNB) position for 2026–27. The presentation highlighted that although the HNB allocation shows a headline increase of £4.7 million, this uplift is entirely the result of rolled-in grants, rather than additional funding. In practice, the expenditure requirements attached to these grants exceed the income by approximately £0.5 million, effectively creating a reduction in real terms.

Modelling for 2026–27 identifies a projected in-year deficit of around £73.3 million, largely driven by rising numbers of Education, Health and Care Plans (EHCPs), continued pressure on specialist placements, increased use of alternative provision, and inflationary impacts. Forecasts indicate that the number of EHCPs will rise to just over 5,000 next year, continuing the long-term upward trend.

Forum members queried why several new grants had been absorbed into the block and were directed to the list included in the report appendices. These relate to a range of provision types including further education and specialist academy places.

During discussion, Forum members raised several points:

Alternative Provision (AP) pressures: Concern was expressed about the 25% projected increase in AP expenditure. Members emphasised that the operational burden on schools—particularly the administrative time needed to commission and monitor AP—continues to grow without associated funding. Examples were provided of delays in securing transport, which can result in schools paying for provision that pupils are unable to attend. The Forum asked that these issues be addressed within wider planning.

Independent specialist placements: It was noted that spending in this area has risen significantly and now represents a substantial share of the overall HNB budget. Members requested a more detailed breakdown of placement numbers and costs to support future scrutiny. An updated report will be circulated outside the meeting.

Opportunities for Learning Centre-led alternatives: The Forum reiterated that there may be opportunities for locally delivered alternatives to certain AP packages if appropriate staffing models can be funded. Members noted that previous proposals had not progressed and asked that these be revisited as part of wider SEND improvement work.

The national context was also considered. The recently published SEND White Paper sets out an intention for the Department for Education to potentially fund up to 90% of local authority DSG deficits, subject to each authority submitting an approved plan. Early estimates indicate that, for Dorset, this could equate to a contribution of around £135 million, although a local contribution would still be required. The Forum noted that the forthcoming improvement plan will need to demonstrate both improved outcomes and a credible route to long-term financial sustainability.

Members also highlighted the implications for mainstream schools. It was recognised that national policy changes envisage a shift towards more children being educated locally in mainstream settings, which may in future place greater financial responsibility on school budgets. Concerns were raised about the scale of efficiencies that could be required and the importance of coordinated system-wide support.

The Forum concluded that while the financial position remains extremely challenging, further clarity is expected through the SEND reform timetable. A more detailed discussion will take place at the upcoming HNB workshop, where options for investment, commissioning, and cost management will be explored in greater depth.

36. Update On Mainstream Schools' Funding Formula For 2026-27 In the Schools' Block

The Forum received an update explaining the position in relation to the previously approved 0.5% transfer from the Schools Block to the High Needs Block, as reflected in the Authority Proforma Tool (APT).

Members discussed the timing and submission of the APT, noting that it had been completed and submitted before the Secretary of State's decision on the block transfer was known. Concern was raised that this left limited practical scope to respond differently should approval not have been granted, given that the APT submission window closes before school and academy budgets are finalised.

During discussion, the Forum explored whether the inclusion of the transfer in the APT may have presented it as an assumed position rather than a decision still subject to approval. It was clarified that only one APT can be submitted, and that the authority had acted in line with expectations at the time, reflecting the safety-valve context and the requirement to submit a balanced Schools Block position.

Members fed back significant concern from the school sector about the financial impact of the transfer, particularly in light of the subsequent publication of the SEND White Paper, which has altered the national context around DSG deficit recovery. It was noted that this change in context had reignited questions about whether schools should continue to contribute to deficit mitigation in the same way.

The Forum was advised that once the APT window closes and funding allocations are issued, it is not possible to resubmit or amend the proforma for that financial year. However, work is now underway to consider how future formula decisions and funding rates might help mitigate the impact of the transfer within the constraints of national rules.

However officers recognised the Unique position these events have left schools in and will therefore work pragmatically with the forum and others to devise a mechanism which ensures schools receive appropriate levels of support by designing a formula that meets inclusive outcomes

37. Annual Review of The Constitution, Election Procedures for Schools' Forum

Forum considered a report reviewing the Schools Forum Constitution, presented as part of the annual update process.

It was explained that membership numbers had been reviewed against the October School Census. Although there has been a small shift towards academy representation, the Forum had previously agreed the importance of maintaining balance and ensuring that the views of small maintained schools continue to be represented. In line with the Schools Forum Good Practice Guide, it was therefore proposed that the current constitutional structure be frozen for a further year, with a full review to take place again at this point next year.

The Forum was asked to consider a proposed change to term-of-office arrangements, particularly in relation to mid-cycle appointments. Members were reminded that the current Constitution operates on a two-year term, with appointments made mid-cycle serving only the remainder of the existing term. It was proposed that the standard term of office be extended to four years, and where a member is appointed part-way through a cycle, they would be offered a full four-year term, rather than only the remaining balance.

This proposal was put forward to support continuity and allow members sufficient time to become familiar with the increasing complexity of Forum business, particularly given forthcoming SEND reforms and the expanding scope of DSG-related decisions. It was noted that this approach aligns with wider school governance practice.

Members indicated support for the proposal, noting that a two-year term was relatively short and that longer terms would help retain expertise and provide greater stability.

Existing members could remain in place and current vacancies could be filled using election processes which would continue to operate in line with the timetable set out in Appendix C, including adherence to academy trust representation caps, which are reviewed annually in line with pupil numbers.

The Forum also noted the process for the annual election of Chair and Vice-Chair, as set out in Appendix D, which will take place at the July meeting.

The Forum agreed to freeze the current Constitution for a further year.

The Forum approved the move to four-year terms of office, including the provision that mid-cycle appointments will be offered a full four-year term.

No further questions were raised.

38. Dedicated Schools' Grant (DSG) Outturn For 2025-26 Q3

The Forum received a report setting out the Quarter 3 (end of December 2025) DSG outturn position.

It was reported that the DSG is forecasting an overall overspend of just under £56 million at Quarter 3. This compares with a £37.3 million overspend in 2024-25, and reflects the ongoing pattern of the deficit increasing by approximately £20 million per year. When combined with projected future deficits, the cumulative DSG position is expected to reach around £150 million.

Members were reminded that this cumulative deficit is currently being carried by the local authority as a cash-flow pressure. It was noted that the cost of borrowing associated with this position is now approximately £4.9 million per year, reducing the funding available for other council services.

The report confirmed that the High Needs Block remains the primary driver of the overspend. Key elements highlighted included:

- **Specialist** **placements:**
The number of children in specialist provision was higher than modelled, with 307 full-time equivalent placements compared with a budget assumption of 261. While average placement costs were lower than anticipated, the increased volume still resulted in an additional in-year pressure of around £1.9 million.
- **Alternative** **Provision** **(AP):**
Continued growth in AP placements was identified as a further significant contributor to the overspend, consistent with trends reported elsewhere in the agenda.
- **Early** **Years** **Block:**
A £0.9 million overspend was reported, resulting from an over-accrual at the end of the previous year. It was emphasised that this represents a timing issue rather than a structural problem, and reflects changes to early years funding arrangements rather than underlying demand pressures.
- **Central** **Schools** **Services** **Block:**
A small overspend of approximately £40,000 was reported, relating to centrally procured licences where national costs exceeded the amount funded through the DSG.

A long-term chart showing the growth in Education, Health and Care Plans (EHCPs) was highlighted, illustrating a sharp upward trend since 2013. It was noted that current modelling suggests this growth is unlikely to taper off until the early 2030s, reinforcing the structural nature of the pressure on the High Needs Block.

Members requested greater granularity in future outturn reporting to support scrutiny. It was suggested that the overall DSG overspend be broken down in a similar way to the 2026–27 budget model, separating:

- specialist placements,
- independent placements,
- mainstream and specialist top-ups, and
- alternative provision and exceptional packages.

This was supported as a way of enabling the Forum to better understand where the most significant pressures are arising.

It was confirmed that a more detailed breakdown would be provided alongside the Quarter 4 outturn.

39. **Any other business**

Members were reminded of the High Needs Block workshop scheduled for 27th April.

Appendix A: Action Log

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Action Log - 3rd July 2026

Title	Meeting Date	Action	Officer	Expected Completion Date
2025/07	07/11/25	Provide data on specialist-in-mainstream placements, associated costs, and sufficiency planning for review	Ellen Eager; Hannah Davis	27/03/26
2025/08	07/11/25	Provide detailed update on sufficiency planning and capacity projects, including timelines for new provision.	Sean Cremer; Jen Furnell	27/03/26
2025/09	27/03/26	Detail in respect of DSG overspend, separating specialist placements, independent placements, mainstream and specialist top-ups and AP and exceptional packages.	Lee House	03/07/26
2025/10	27/03/26	Detail in respect of independent specialsit placements: numbers and costs	Lee House	03/07/26

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Dorset Schools' Forum

Date of Meeting:	3rd July 2026
Report Title:	Work and Membership of the Dorset Schools Forum 2026-27
Executive Director:	Paul Dempsey, Executive Director for People - Children
Corporate Director:	Jen Furnell, Director for Education and Learning
Presenting Officer:	Vanessa Eddey, Team Manager, School Finance and Support, Commissioning & Partnerships
Report Status:	Public
Reason for Submission to Schools' Forum:	For CONSULTATION Under Forum power/responsibility: 2(g) Schools' Forum membership issues.
Recommendation(s):	That, members take note of the following. A: The results of the elections for Members taking up their seats from September 2026. Including appointments made by the local authority where No nominations were received. B: The proposed forward plan for 2026/27 C: The proposed calendar of meetings for 2026/27
Reason for Recommendation(s):	To ensure that all members can contribute to the work of forum. fully in the forthcoming academic year and are apprised of membership changes.
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 Results of Elections Since our last meeting in March 2026, elections have taken place for the Academy Primary representative, Primary Maintained representative and Early Years representative. All elections were administered by the local authority in the absence of any phase-specific association. - Mick Homer has been elected as the Primary Academy representative.	

- Adam Gough has been elected as the Primary Maintained representative
- The Early Years sector had one nomination and one remaining vacancy. Alex Fulton was elected unopposed.

In accordance with the Schools' Forum Regulations 2012, the local authority has exercised its statutory power to appoint eligible individuals to posts that received no nominations during the nomination period.

Summary of Results

Phase	Name of Elected/Appointed Representative(s)
Primary Academy	Mick Homer (St Mary's Charminster, Initio MAT)
Primary Maintained	Adam Gough (Bincombe Valley Primary)
Early Years	Alex Fulton (Little Birch Pre-School)

Cllr Carole Jones was appointed as observer on the Schools Forum at the council's annual meeting on 14 May 2026.

1.2 Forward Plan

Members are invited to read the draft forward plan for the forthcoming academic year, as set out in appendix A. If you would like to provide any feedback, this can be done using the contact details for myself above.

1.3 Calendar of Meetings

Members are invited to review the calendar of meetings for the forthcoming academic year, as set out in appendix B. If you would like to provide any feedback, This can be done using the contact details for myself above.

Should members have any diary conflicts with these dates, please ensure to contact me as soon as possible so that we ensure meetings remain quorate and have a broad spectrum of views.

2. Financial Implications

n/a

3. Climate Implications

n/a

4. Other implications

n/a

5. Risk Assessment: n/a

6. Equalities Impact Assessment (EqIA)

n/a

7. Appendices

Appendix A: Draft Forward plan for the 2026/27 academic year.

Appendix B: Draft calendar of meetings for the 2026/2027 academic year.

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.

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Item Type	Responsible Officer	Item
25th September 2026		
Consultation	Tom Easterbrook	Consultation on Proposed Changes to the Scheme for Financing Maintained Schools
Consultation	Vanessa Eddey	Schools Falling Rolls Fund distribution method
Information	Lee House / Lisa Cullen	Dedicated Schools' Grant (DSG) monitoring Q1 2026-27
Information	Lisa Gray	School Improvement Impact
Information	Paul Scothern	Capital Funding for Maintained Schools update
Information	Vanessa Eddey	Update on the distribution of the Inclusive Early Years Fund
6th November 2026		
Workshop		TBC
Information	Lee House / Lisa Cullen	Dedicated Schools' Grant (DSG) monitoring Q2 2026 – 27
Consultation	Ellen Eager	Annual Review of places to be commissioned by the LA in local specialist provision
Consultation		Annual Review of arrangements for education of pupils with SEND
Consultation		Annual Review of arrangements for use of learning centres and education of children out of school
Consultation	Vanessa Eddey	Exceptional circumstances funding, de-delegation and education functions
Information	Lisa Gray	School Based Nurseries Phase 3

Item Type	Responsible Officer	Item
Information	Jen Furnell	SEND reform update
Consultation	Vanessa Eddey	Annual review of Financial Efficiency Policy for maintained schools
15th January 2027		
Information	Lee House / Lisa Cullen	Dedicated Schools' Grant (DSG) monitoring Q3 2026-27
Information	Vanessa Eddey	Individual Schools' Budget (ISB) outturn forecast 2026-27
Consultation	Liz Curtis-Jones	Annual review of the arrangements for Early Years Provision
Consultation	Vanessa Eddey	Individual Schools' Budget (ISB) setting 2027-28 (APT)
Approval	Vanessa Eddey	Early Years Block (DSG) budget setting for 2027-28
12th February 2027		
RESERVE MEETING		
19th March 2027		
Workshop		TBC
Consultation	Tom Easterbrook	Review of Constitution and Election Arrangements
Consultation		HNB (DSG) budget setting for 2027-28
Decision	Ed Denham	Pupil Growth Applications 27-28

Item Type	Responsible Officer	Item
2nd July 2027		
Decision	Tom Easterbrook	Election of Chair and Vice Chair
Information	Tom Easterbrook	Confirmation of Seats following Elections
Information	Jen Furnell	SEND Reform Update
Consultation	Ross Bowell	Schools, Early Years and High Needs Block funding formulae for next financial year: areas for review and planned timetable for consultation
Consultation	Tom Easterbrook	Schools' Forum Work Programme for 2027/28
Information	Lee House / Lisa Cullen	Dedicated Schools' Grant (DSG) outturn position 2026-27
Information	Vanessa Eddey	Individual Schools' Budget (ISB) outturn position 2026-27

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Dorset Schools' Forum – Proposed Calendar of Meetings 2026/27

Date	Venue	Type
Friday, 25th September 2026	Online (MS Teams)	Regular
Friday, 6th November 2026	Online (MS Teams)	Regular
Friday, 15th January 2027	Online (MS Teams)	Regular
Friday, 12th February 2027	Online (MS Teams)	Regular
Friday, 19th March 2027	Online (MS Teams)	Regular
Friday, 2nd July 2027	Online (MS Teams)	Regular

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Dorset Schools' Forum

Date of Meeting:	3 July 2026
Report Title:	HIGH NEEDS ALLOCATIONS FUNDED BY BLOCK TRANSFER
Executive Director:	Paul Dempsey, Executive Director for People - Children
Corporate Director:	Jen Furnell, Director for Education and Learning
Presenting Officer:	Ellen Eager Sufficiency & Funding Manager
Report Status:	Public
Reason for Submission to Schools' Forum:	For APPROVAL & CONSULTATION as detailed in the report Under Forum power/responsibilities: 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.
Recommendation(s):	That the Schools' Forum: 1. That Schools Forum members consider options A and B and give feedback to the LA on the most appropriate distribution method.

Reason for Recommendation(s):	
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

As you will be aware, £1.3 million was transferred from the Schools Block to the High Needs Block for 2026–27. At the time of presenting the Schools Block budget to the Schools Forum on 16 January 2026, the white paper titled “Every Child Achieving and Thriving” had not been published. The LA felt it was necessary to transfer 0.5% from the schools' block to the high needs block to secure future DfE contributions to the HNB deficit.

By the time the white paper was published on 23 February 2026, the Secretary of State had already approved the disapplication request and the APT submitted to the DfE could not be amended. At the Schools Forum meeting on 28 March, it was agreed to pay the £1.3m back to mainstream schools to support the embedding of inclusive practice in line with the white paper aims and objectives.

Officers are presenting two options for returning the £1.3m.

- Preferred Option A: Uses the inclusive mainstream fund (IMF) methodology with scaled back values to equal £1.3m. Within the available funding, schools could be paid:

	IMF	HNB trf
Lump sum	£3,000	£2,520
Primary	£16	£13
Primary LPA	£79	£66
Secondary	£14	£12
Secondary LPA	£88	£74

- Option B: Uses pupil factors from the October 2025 census to distribute £1.3m to schools. This uses basic per-pupil funding (age weighted pupil unit), Free school meals, IDACI deprivation measure, low prior attainment (LPA), English as an additional language and mobility. Just using pupil factors gives lower funding to schools with lower pupil numbers.

Option A is our preferred option as it aligns to the DfE's own methodology for the IMF allocations.

Expectations for use of funding

Our expectation is that any redistributed funding is used alongside the government's announced Inclusive Mainstream Fund to strengthen whole-school inclusive practice and to support children and young people with additional needs early and effectively in your mainstream settings.

This expectation reflects the direction set out in the Department for Education's SEND reform programme and the Schools White Paper Every Child Achieving and Thriving. The aim is to reduce escalation to specialist provision where needs can be met well in mainstream, while ensuring that children who require specialist support can access it appropriately.

Embedding inclusive practice

We expect schools in Dorset to use this funding to embed inclusive practice in line with the DfE's seven principles of inclusion:

1. Ambitious leadership and governance that embeds inclusion as a core whole-school priority
2. Evidence-based support prioritising early intervention, particularly for commonly occurring and predictable needs
3. High-quality teaching with a curriculum designed for all learners, reducing barriers to participation and progress
4. Accessible and enriching provision beyond the classroom, including pastoral, social and wider curricular opportunities
5. A safe and respectful culture that fosters belonging, positive behaviour and good attendance
6. Strong partnerships with families and wider services, recognising that effective inclusion is built on trust and collaboration
7. Inclusive environments with continuous improvements to accessibility, both physical and curricular

Schools retain professional autonomy over how this funding is deployed. However, it should be used to strengthen universal and targeted provision, in line with the DfE's examples of best practice [Inclusive mainstream fund: best practice for schools - GOV.UK](#).

Accountability and next steps

As with the Inclusive Mainstream Fund, schools should be able to articulate how this funding is being used to improve inclusive practice and outcomes.

2. Financial Implications

To support the safety valve program, a transfer of 0.5% of the schools block to the HNB had been requested through a disapplication request, equating to £1,348,041.

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.

Following the publication of the white paper titled "Every Child Achieving and Thriving", it was agreed at the March Schools Forum to pay the £1.3m to schools to embed inclusive practice.

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)

7. Not applicable

8. Appendices

Appendix A: Comparison of Options A and B by school

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.

Appendix A

		Option A	Option B	
LAESTAB	School Name	Inclusive Mainstream fund methodology	Add back 0.57% to actual APT pupil led factors	Option A-B
		£1,348,041	£1,348,041	
8382000	Trinity Church of England First School	£5,597	£3,227	£2,370
8382001	Bovington Academy	£8,162	£4,866	£3,297
8382002	Downlands Community School	£9,425	£4,739	£4,686
8382003	Bridport Primary School	£12,999	£7,435	£5,565
8382004	Beechcroft St Paul's CofE Primary School	£9,508	£5,717	£3,791
8382005	Broadmayne First School	£7,406	£3,664	£3,741
8382006	Beaminster St Mary's Academy	£6,262	£3,899	£2,363
8382007	Dunbury Church of England Academy	£6,809	£3,282	£3,527
8382009	Cheselbourne Village School	£3,888	£1,146	£2,742
8382010	Loders CofE Primary Academy	£4,624	£1,530	£3,093
8382011	Colehill First School	£6,564	£3,714	£2,849
8382012	Pamphill Church of England First School	£4,103	£1,710	£2,394
8382013	Wool Church of England Primary School	£6,528	£2,609	£3,918
8382014	Portesham Church of England Primary School	£4,436	£1,257	£3,179
8382015	Damers First School	£21,699	£13,369	£8,329
8382016	St Andrew's Church of England Primary School	£9,960	£5,857	£4,103
8382017	Gillingham Primary School	£10,161	£6,387	£3,774
8382018	St Andrew's Church of England Primary School	£5,917	£2,726	£3,191
8382019	Bere Regis Primary and Preschool	£6,417	£2,688	£3,729
8382020	Ferndown First School	£13,782	£9,427	£4,355
8382021	Sixpenny Handley First School and Nursery	£4,146	£1,438	£2,708
8382022	Hazelbury Bryan Primary School	£4,975	£2,413	£2,562
8382024	Lytchett Matravers Primary School	£15,927	£10,690	£5,237
8382025	Manor Park Church of England First School	£14,656	£9,201	£5,455
8382026	Upton Infant School	£10,532	£6,775	£3,756
8382027	Milborne St Andrew First School	£4,804	£1,335	£3,470
8382028	Charmouth Primary School	£6,033	£2,215	£3,818
8382029	Sherborne Primary School	£12,731	£8,592	£4,139
8382030	Stower Provost Community School	£5,002	£2,320	£2,682
8382031	St Michael's CofE Primary School, Lyme Regis	£5,136	£1,726	£3,410
8382032	Sturminster Marshall First School	£4,032	£1,377	£2,655
8382033	Wyke Primary School	£8,228	£4,326	£3,902
8382034	William Barnes Primary School	£7,763	£4,526	£3,237
8382035	Swanage Primary School	£8,605	£5,214	£3,391
8382036	St Gregory's Church of England Primary School, Marnh	£4,345	£1,438	£2,907
8382037	Thorncombe, St Mary's Church of England Primary Aca	£3,261	£639	£2,623
8382038	Three Legged Cross First and Nursery School	£5,193	£2,086	£3,106
8382040	Wimborne First School and Nursery	£12,576	£9,563	£3,013
8382044	Upton Junior School	£13,955	£9,579	£4,375
8382045	Parley First School	£15,219	£8,428	£6,791
8382048	Hillside Community First School	£9,983	£5,862	£4,121

Schools' Forum

Date: 3 July 2026

		Option A	Option B	
LAESTAB	School Name	Inclusive Mainstream fund methodology	Add back 0.57% to actual APT pupil led factors	Option A-B
		£1,348,041	£1,348,041	
8382050	Rushcombe First School	£9,302	£7,624	£1,678
8382053	Oakhurst Community First School	£7,394	£3,958	£3,435
8382054	Hayeswood First School	£6,910	£3,655	£3,254
8382201	Chickerell Primary Academy	£14,512	£10,670	£3,843
8382209	Wyke Regis Infant School and Nursery	£8,922	£5,103	£3,820
8382213	Bincombe Valley Primary School	£12,529	£8,096	£4,433
8382214	Radipole Primary School	£16,528	£11,534	£4,994
8382216	Southill Primary School	£8,564	£5,544	£3,020
8382246	St Ives Primary & Nursery School	£7,245	£5,297	£1,948
8382257	Henbury View First School	£6,897	£3,690	£3,207
8382262	The Prince of Wales School	£7,790	£4,065	£3,726
8383000	St James' Church of England First School and Nursery,	£4,936	£2,260	£2,675
8383001	Stoborough Church of England Primary School	£8,284	£4,991	£3,293
8383002	Archbishop Wake Church of England Primary School	£15,840	£10,245	£5,595
8383004	Milldown CofE Academy	£9,302	£5,671	£3,631
8383005	St George's Church of England School, Bourton	£7,288	£3,078	£4,210
8383006	Bridport, St Mary's Church of England Primary School	£11,254	£5,875	£5,379
8383007	Burton Bradstock Church of England Voluntary Control	£4,578	£2,299	£2,280
8383009	Cerne Abbas CofE VC First School	£4,903	£1,638	£3,266
8383010	Corfe Castle Church of England Primary School	£5,667	£1,903	£3,765
8383017	St James Church of England First School	£5,382	£2,816	£2,566
8383021	Maiden Newton, Greenford Church of England Primary	£7,362	£3,883	£3,479
8383024	Frome Valley CofE VA First School	£6,639	£3,254	£3,385
8383026	Puddletown Church of England First School	£7,466	£3,379	£4,088
8383028	Sherborne Abbey Church of England Primary School	£16,346	£9,710	£6,636
8383032	Wareham St Mary Church of England Primary School	£9,185	£4,664	£4,521
8383042	St John's Church of England First School, Wimborne	£7,257	£4,092	£3,165
8383045	All Saints Church of England Voluntary Controlled Prim	£6,787	£3,355	£3,432
8383047	Pimperne Church of England VC Primary School	£8,469	£4,838	£3,631
8383049	St Mary's Church of England Primary School, Bradford	£4,720	£2,187	£2,533
8383050	Buckland Newton Church of England Primary School	£6,285	£2,423	£3,862
8383051	Broadwindsor Church of England Voluntary Controlled	£5,521	£2,352	£3,169
8383052	Shaftesbury Church of England Primary School	£15,345	£9,800	£5,544
8383053	Verwood Church of England First School	£11,161	£6,793	£4,367
8383055	St Mary's CofE First School & Nursery	£6,406	£3,399	£3,007
8383058	St Andrew's Church of England Primary School	£6,839	£2,861	£3,978
8383157	St Mary's Church of England First School, Charminste	£7,901	£3,807	£4,094
8383202	Wyke Regis Church of England Junior School	£14,985	£9,752	£5,233
8383304	Blandford St Mary Church of England Primary School	£8,485	£5,756	£2,729

		Option A	Option B	
LAESTAB	School Name	Inclusive Mainstream fund methodology	Add back 0.57% to actual APT pupil led factors	Option A-B
		£1,348,041	£1,348,041	
8383314	St Nicholas Church of England Primary School, Child O	£6,253	£3,228	£3,025
8383317	Cranborne Church of England First School	£4,586	£1,627	£2,959
8383319	Durweston Church of England Primary School	£6,876	£3,362	£3,514
8383321	Sticklands Church of England Voluntary Aided Primary	£5,292	£1,969	£3,323
8383323	Milton-on-Stour Church of England Primary School	£6,880	£3,170	£3,710
8383325	Hampreston Church of England Voluntary Aided First S	£6,367	£3,520	£2,848
8383331	St George's Church of England Primary School, Langto	£4,394	£1,810	£2,583
8383332	Thorner's Church of England School, Litton Cheney	£5,736	£2,624	£3,112
8383338	Marshwood CofE Primary Academy	£3,755	£1,213	£2,542
8383342	Parrett and Axe Church of England Voluntary Aided Pri	£7,610	£3,628	£3,981
8383343	Motcombe CofE Primary School	£8,532	£4,069	£4,464
8383345	Salway Ash Church of England Voluntary Aided Primar	£6,537	£2,811	£3,726
8383350	Piddle Valley Church of England First School	£3,989	£948	£3,041
8383352	Powerstock Church of England Voluntary Aided Primar	£4,437	£962	£3,475
8383363	Swanage St Mark's Church of England Primary School	£6,292	£2,948	£3,344
8383364	Symondsbury Church of England Voluntary Aided Prim	£6,604	£2,886	£3,718
8383367	Thornford CofE Primary School	£5,288	£2,580	£2,708
8383369	Trent Young's CofE Primary School	£5,542	£3,562	£1,981
8383372	Sandford St Martin's Church of England Voluntary Aide	£13,625	£9,033	£4,592
8383376	Wimborne St Giles Church of England First School and	£4,085	£1,550	£2,535
8383377	Winterbourne Valley Church of England Aided First Sc	£5,350	£1,633	£3,717
8383379	Witchampton Church of England First School	£4,037	£1,177	£2,860
8383400	St Catherine's Roman Catholic School	£5,729	£2,752	£2,977
8383401	St Mary & St Joseph's Catholic Primary School	£5,342	£2,149	£3,193
8383402	St Mary's Catholic Primary School, Marnhull	£4,733	£1,958	£2,776
8383403	Spetisbury CofE Primary School	£8,915	£4,979	£3,935
8383404	St Mary's Catholic First School, Dorchester	£6,315	£3,787	£2,527
8383406	St Mary's Catholic Primary School, Swanage	£8,593	£4,732	£3,860
8383407	St Mary the Virgin Church of England Primary School	£9,279	£5,345	£3,934
8383408	Conifers Primary School	£15,248	£9,773	£5,474
8383652	St Nicholas and St Laurence Church of England Primar	£11,033	£5,888	£5,145
8383655	St John's Church of England Primary School	£10,340	£5,909	£4,432
8383670	St Augustine's Catholic Primary School, Weymouth	£8,691	£5,513	£3,178
8383693	The Abbey CofE VA Primary School, Shaftesbury	£8,766	£5,428	£3,338
8383700	Holy Trinity Church of England VC Primary School & Co	£16,901	£12,447	£4,455
8383701	St George's Foundation Primary School	£17,929	£11,872	£6,057
8383702	Lulworth and Winfrith CofE Primary School	£6,196	£2,823	£3,373
8384000	All Saints' Church of England Academy	£9,673	£25,189	-£15,517
8384001	The Swanage School	£6,874	£14,674	-£7,800
8384002	The Sir John Colfox Academy	£10,462	£26,179	-£15,717
8384003	Dorset Studio School	£6,648	£14,192	-£7,544

		Option A	Option B	
LAESTAB	School Name	Inclusive Mainstream fund methodology	Add back 0.57% to actual APT pupil led factors	Option A-B
		£1,348,041	£1,348,041	
8384004	Wey Valley Academy	£14,238	£41,302	-£27,064
8384005	Budmouth Academy Weymouth	£17,308	£50,179	-£32,871
8384006	St Osmund's Church of England Middle School	£16,549	£22,506	-£5,957
8384007	Atlantic Academy Portland	£17,636	£29,277	-£11,641
8384009	Emmanuel Church of England Middle School	£12,112	£13,434	-£1,322
8384020	Cranborne Middle School	£7,718	£8,640	-£922
8384022	Ferndown Upper School	£13,299	£36,984	-£23,685
8384024	The Purbeck School	£12,891	£34,241	-£21,350
8384029	Allenbourn Middle School	£11,379	£15,206	-£3,827
8384031	Dorchester Middle School	£13,228	£17,289	-£4,060
8384033	West Moors Middle School	£7,703	£8,119	-£415
8384034	Lockyer's Middle School	£12,198	£13,004	-£806
8384035	Lytchett Minster School	£17,784	£49,946	-£32,162
8384179	Sturminster Newton High School	£9,091	£21,975	-£12,884
8384184	Ferndown Middle School	£15,897	£19,711	-£3,813
8384503	Gillingham School	£19,024	£53,771	-£34,746
8384504	Queen Elizabeth's School	£14,726	£40,741	-£26,014
8384505	Beaminster School	£9,917	£24,117	-£14,200
8384510	The Blandford School	£14,266	£38,542	-£24,277
8384511	Shaftesbury School	£10,909	£28,417	-£17,508
8384512	The Gryphon School	£16,603	£46,564	-£29,962
8384604	St Michael's Church of England Middle School, Colehill	£14,580	£17,616	-£3,036
8384615	The Thomas Hardy School	£18,444	£54,652	-£36,209
8384802	St Mary's Church of England Middle School, Puddletown	£10,977	£14,012	-£3,035
8385201	Stalbridge Church of England Primary School	£9,926	£5,240	£4,686
8385203	Shillingstone Church of England Primary School	£6,007	£2,865	£3,142
8385401	The Woodroffe School	£11,355	£28,483	-£17,128

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Dorset Schools' Forum

Date of Meeting:	3 July 2026
Report Title:	Dedicated Schools Grant Outturn 2025-26
Executive Director:	Paul Dempsey, Executive Director for People - Children
Report Author: Title: Tel: Email:	Lee House (Main outturn report) Acting Head of Finance – Business Partnering 01305 225032 Lee.house@dorsetcouncil.gov.uk
Presenting Officer:	As above
Report Status:	Public
Reason for Submission to Schools' Forum:	For ~~APPROVAL~~ / CONSULTATION / 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 Outturn position for 2025-26
Reason for Recommendation(s):	To keep the Schools' Forum informed with the latest position on the Dedicated Schools' Grant
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. The Dedicated School Grant (DSG) is a ring-fenced grant of which the majority is used to fund individual schools 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.
3. There are four blocks within the DSG: Schools Block (SB), Early Years Block (EYB), High Needs Block (HNB) and Central Services Schools Block (CSSB).
4. DSG 2025-26 Final position
5. Dorset's final DSG allocation totalled £368.7m and actual expenditure was £423.1m, resulting in an overspend of £54.5m. The cumulative DSG deficit as at the 31 March 2026 was £148.8m (Appendix A).
6. The DSG was overspent by £54.452m, comprising of the following:

Block (£m)	Allocation before deductions	Outturn Variance
Schools Block	262.7	0.0
High Needs Block	60.2	(55.2)
Early Years Block	43.6	0.7
Central School Services Block	2.2	0.0
TOTAL	368.7	(54.5)

7. The Early Years Block underspent by £0.68m this was due to an income accrual estimation for stretched hours made at the end of 24/25 and some underspends in 25/26. The Central Services to Schools Block £0.04m underspent. The Schools Block had no variance.
8. The DSG outturn position for 2024-25 was a £37.3m overspend.
9. Any deficit associated with the DSG is kept off council's 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.
10. Whilst the deficit is therefore held separately from the Council's General Fund, there is a cashflow pressure resulting from carrying a £148.8m deficit meaning that the Council has access to £148.8m less cash than it would otherwise. As a result, interest foregone 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.

11. The government announced SEND reforms in early 2026. First drafts of the Local SEND Reform Plans are due by 19th June 2026.
12. The historical DSG deficit experienced by most upper tier local authorities is a long and well-documented risk stemming from a change in government legislation in 2014 with a number of factors driving the overspend, including the increase in children and young people who require an EHCP. The National Audit Office: [Support for children and young people with special educational needs](#) provides further context.
13. Any reforms will take time to implement and materials from the DfE so far suggest staged implementation of the changes.

DSG - Accounting treatment

14. Dorset Council accounts have been produced in accordance with the Schools and Early Years Finance (England) Regulations 2020, which required local authorities to carry forward overspends of Dedicated School Grant (DSG).
15. 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. The ceasing of the Safety Valve programme was also announced during the year.
16. Each Local Authority is required to submit a Local SEND Reform Plan. This plan requires Secretary of State for education approval prior to any grant being made available. This sits alongside announced SEND reforms announced in the SEND white paper released on 23rd February 2026.
17. High Needs Block (HNB)
18. The HNB 2025-26 overspend is £55.2m, the outturn position for 2024-25 was a £38.2m overspend. The 2025-26 HNB was set with a £51.1m overspend at budget set.
19. The growth in the number of children and young people requiring an Education, Health and Care Plan (EHCP) continues to be one of the main drivers for the High Needs Block overspend.
20. As of 31 March 2026, there were 4,944 children and young people with EHCPs, an increase of 539 over the 12 months (392 for 2022-23, 319 for 2023-24, 430 for 2024-25). Chart 1 plots the increase in the number of children and young people requiring an EHCP since 2014.

Number of Statements / EHCPs over time

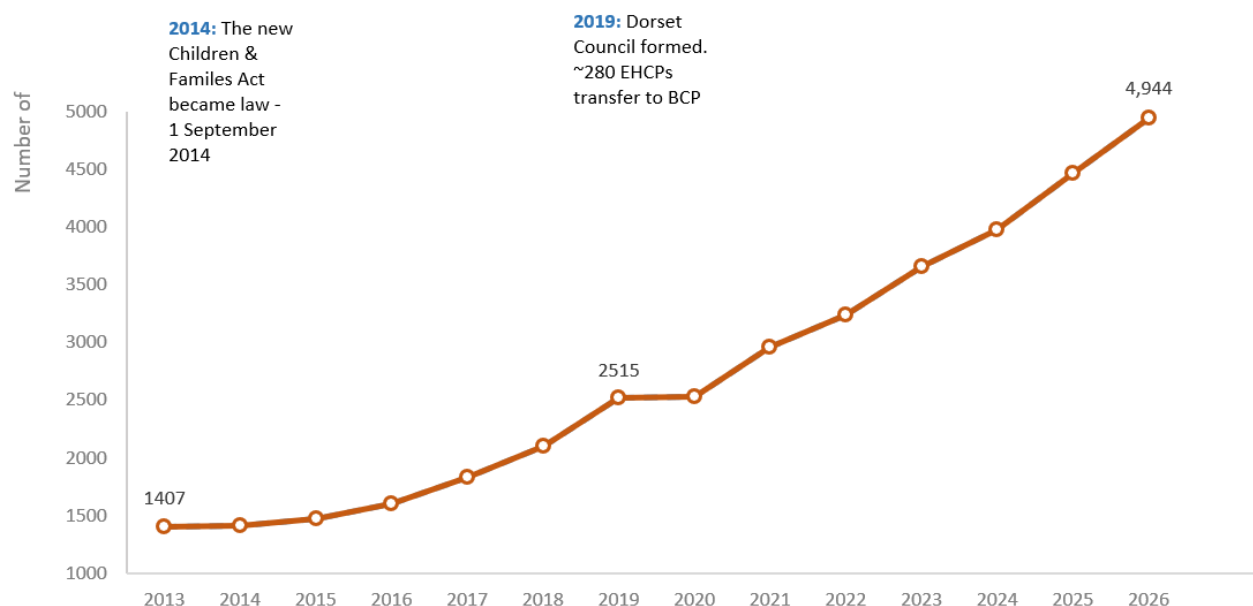


CHART 1

CHART 1: Number of CYP with an EHCP since 2013

21. Using snapshot data of the EHCP cohorts, including previous years and at the 31 March 2026 (Appendix C), the overall percentage of the EHCP demographic within specialist provision remains around 40%, there has been a 99 increase (164 increase in 2022-23, 126 increase in 2023-24, 117 increase in 2024-25). This includes the Coombe House provision of 133.
22. A cost analysis is provided in Appendix D and E. These appendices detail the cost range of specialist packages and average placement costs.
23. A variance analysis of select HNB budgets is available in Appendix G. This shows the variance (price and volume) between what was budgeted, and what happened over the year. This is for budgets where individual packages are identifiable, i.e., top up packages for children in special schools.
24. Top up payments, bespoke packages, and Alternative Provision
25. Top-ups paid to settings were less than budgeted (£0.26m underspend).
26. This area recorded one of the greatest variances (£2.55m) the budget for Alternative Provision packages, excluding children in Learning Centres, was £4.78m with spend of £7.33m. The number of overall referrals has increased from 1,106 in 24/25 to 1,371 in 25/26 with a noticeable increase in referrals for Year 10 and 11 (328 in 24/25 to 436 in 25/26).
27. The overspend on bespoke packages for Mainstream and Special schools was a net £52k for 25/26.
28. Placements & Direct Payments

29. This area also recorded one of the greatest variances (£1.6m overspend). Included within this area is spend on Independent Special School placements and Specialist post-16 Institutes which accounts for £1.3m of the overspend. (Appendix E).

30. Average costs have been lower than the budgeted estimate of £74k and averaged to around £65k for 25/26.

31. SEN Support Services & Contracts

32. The HNB funds several services to support a range of needs. This includes Best Start in Life, Hearing and Vision Support Services, Specialist Teachers and Physical and Medical Needs. There are approximately 60 (46.85FTE) specialist positions within this area.

33. Through vacancy management and income from BCP for the Hearing and Vision Support Services, this area underspent by £0.067m.

34. Contracts and development underspent by £0.014m.

35. Early Years Block (EYB)

36. The EYB funds:

- universal 15-hour entitlement for 3 and 4-year-olds
- additional 15-hour entitlement for 3 and 4-year-old children of eligible working families
- 15 hours entitlement for early learning 2-year-olds (formerly families receiving additional support)
- 30 hours entitlement for 2-year-olds from eligible working families
- 30 hours entitlement for children aged 9 months 2 years old from eligible working families
- Early Years Pupil Premium
- Disability Access fund

37. The final allocations for the first three funding streams listed in section 15 will be based on (five-twelfths January 2025 Part Time Equivalents (PTE) census numbers) + (seven-twelfths January 2026 PTE census numbers). This means the current EYB allocation will likely change – this change has been estimated and included in the final carry forward. There have been termly data collections in respect of the 30 hours for children aged 9 months to 2 years, which again will change the EYB allocation and has been estimated and included in the final carry forward.

38. The EYB underspent by £0.68m. The Q3 EYB budget monitoring included a forecast overspend of £0.93m based on an estimate of 2024-25 year-end adjustments and expected stretched hours to be taken in the summer term (families can spread hours over 50 weeks instead of 38 to cover July and August). Reviewing the Q3 year forecast outturn with actual adjustments would have indicated there would not be an overspend. The DfE have now introduced a termly census, rather than data collections, which will help with forecasting in 2026-27.

39. Central Services Schools Block (CSSB)

40. The central school services provide funding for local authorities to carry out central functions on behalf of compulsory school age pupils in maintained schools and academies in England. The funding for the block is based on the national funding formula.

41. The CSSB underspent by £0.037m.

42. Most of this underspend (£0.036m) was due to vacancy savings within the admissions team.

43. Schools Block

44. There is a nil variance on the Schools Block.

45. In year overspends on budgets for Pupil Growth (£0.016m) and the de-delegated area of Trade Union facilities (£0.013m) and Primary Redundancy (£0.016m) have been transferred from reserves (Appendix F).

46. Individual Schools' Budget (ISB) net balances have increased by £2m compared to 2024-25 year-end. Balances and deficits by phase are detailed in Appendix H. Most schools continue to be cautious in their spending and forecasting due to the uncertainty around funding, pay rises and energy costs.

47. All schools with an excess surplus (a year-end balance over 5% or 8% depending on phase) have been contacted to submit plans to the use of the balance, to ensure plans are in line with the reasons included in the Financial Efficiency policy.

48. The number of schools in deficit has increased from 5 to 6. The total deficit balance excluding has reduced from £806k to £349k.

49. DSG Reserves

50. Excluding the DSG Deficit reserve, and school balances reserve, there are four additional DSG reserves: Pupil Growth, De-Delegated, Early Years and Permanent Exclusions (used to transfer funding between settings for children who are excluded or admitted elsewhere following exclusion).

51. Reserve activity is detailed in Appendix F.

52. The combined opening balance (1 April 2025) for the four reserves was £2.58m, and the closing balance (31 March 2026) was £2.42m, a decrease of £0.16m.

53. The main movements:

- £0.016m overspend moved into the Pupil Growth reserve
- £0.168m Early Years Expanded Entitlement grant roll out
- £0.159m movement into the Permanent Exclusions reserve for children who have been permanently excluded. Other net movements of £0.101m is reserve funding used in order to fund the inclusion team £0.088m and the Youth Voice officer £0.13m during the year.

54. Risks and challenges

55. The outcome of Dorset's SEND Reform plan submission.

56. Above inflationary pressures schools and other settings may experience.

57. Continued increases in the number of children and young people who require an EHCP over the funding that is available.

58. The unknown impact of the educational and SEND reforms as further information becomes available.

59. These risks will be monitored during the financial year.

1. Financial Implications

This paper covers the financial implications on the management of the DSG in detail.

2. 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.

3. Climate Implications

None

4. Other implications

None

5. 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.

6. 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.

7. Appendices

Appendix A: Dorset's Cumulative DSG Position - March 2026

Appendix B: Total Dorset DSG outturn variance - March 2026

Appendix C: Dorset's EHCP Position

Appendix D: Cost ranges for high-cost placements

Appendix E: All packages average costs - March 2026

Appendix F: DSG Reserves (£)

Appendix G: Variance Analysis: Select High Needs Block budgets

Appendix H: Individual Schools' Budget (ISB) outturn actuals for 2025-26 and commentary

8. Background Papers

[Every child achieving and thriving - GOV.UK](#)

[High needs funding: 2026 to 2027 operational guide - 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's Cumulative DSG Position - March 2026

Table 1: Dorset's revised DSG Position

	£	£	£
Opening DSG Cumulative Deficit (1 April 2025)	95,629,948		
2025-26 DSG In-year overspend	54,451,869		
Schools Block reserve transfer 0.5%	- 1,313,318		
DSG Cumulative Deficit (31 March 2026)		148,768,499	
Dorset Council 2025-26 contribution	-		
Revised DSG Deficit (for 'Safety Valve' monitoring reporting)		148,768,499	
Closing DSG cumulative deficit (31 March 2026)			148,768,499

Table 2: Required DSG position versus actual DSG position

Required DSG Deficit (for 'Safety Valve') 2025-26	
Actual DSG Deficit (as Table 1)	148,768,499
Over the required 'Safety Valve' DSG Deficit	148,768,499

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Total Dorset DSG forecast variance - March 2026

	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		65,280			65,280
Schools Forum		7,924			7,924
Miscellaneous (not more than 1% of Schools Budget)		39,500			39,500
Licences		-82,996			-82,996
PRC ongoing		6,538			6,538
Dorset SACRE		1,093			1,093
Central services to all schools		0			0
HNB - overspend identified at budget setting			-51,107,820		-51,107,820
HNB - Places			-990,282		-990,282
HNB - Placements and Direct Payments			-1,564,629		-1,564,629
HNB - top up payments			263,727		263,727
HNB - Bespoke packages			-2,295,054		-2,295,054
HNB - NHS support			79,462		79,462
HNB - Contracts and development			13,700		13,700
HNB - hearing and vision support service			66,599		66,599
HNB - specialist teaching			155,961		155,961
HNB - physical and medical service			20,307		20,307
HNB - portage			50,912		50,912
HNB - complex communications			0		0
HNB - other			137,569		137,569
HNB - Recharges			0		0
					0
Early Years - provider budgets 3&4 year olds				331,849	331,849
Early Years - provider budgets 2 year olds				302,527	302,527
Early Years - pupil Premium				0	0
Early Years - centrally retained services				0	0
Early Year - disability access fund				45,962	45,962
	0	37,339	-55,169,545	680,337	-54,451,869

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Dorset's EHCP Position

Numbers:

In-year
change

	31/03/20	31/03/21	31/03/22	31/03/23	31/03/24	31/03/25	31/03/26		
SPECIALIST PROVISION									
Dorset Special School Placements	512	631	688	751	809	845	855		
Independent Special School Placements	142	199	202	274	330	407	439		
OLA Special School Placements	61	74	106	112	108	102	100		
Dorset Resourced Provision Placements	43	85	90	96	102	103	142		
OLA Resourced Provision Placements	14	7	2	4	6	11	8		
Specialist Post 16 Institute Placements	79	98	94	101	96	96	106		
Learning Centre Placements - EHCP Only	48	74	103	91	87	84	86		
Supported Internship Placements	24	42	22	40	56	61	65		
Independent School Placements	14	12	12	14	15	17	24		
TOTAL SPECIALIST PROVISION	937	1222	1319	1483	1609	1726	1825	99	37%
MAINSTREAM PROVISION									
Dorset Mainstream Placements	795	1117	1203	1320	1453	1622	1725		
Dorset Further Education Placements	150	208	238	252	269	290	280		
OLA Further Education Placements	66	83	109	125	125	148	177		
OLA Mainstream Placements	44	59	62	57	50	74	89		
EYS Funding Establishment	9	14	0	0	0	0	0		
Non Maintained Early Years	0	3	49	23	35	46	39		
TOTAL MAINSTREAM PROVISION	1064	1484	1661	1777	1932	2180	2310	130	47%
OTHER									
Education Other Than At School	48	69	86	107	134	169	185		
Elective Home Education	28	40	46	40	58	78	77		
NEET	57	77	101	104	98	92	104		
Awaiting Placement	0	0	0	0	0	0	37		
No school listed	189	137	51	145	137	142	397		
CMOOE					4	15	8		
Alternative Provision					2	0			
EHCP Cease Pending					1	3	1		
TOTAL OTHER PROVISION	322	323	284	396	434	499	809	310	16%
Total EHCP	2323	3029	3264	3656	3975	4405	4944		
Change		706	235	392	319	430	539	539	
							4944		

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Cost ranges for high-cost placements

Full year activity, so includes placements that have ceased. This is not snapshot data.

Independent Post 16	Aug-25	Dec-25	Mar-26
£0- £5,000	3	1	5
£5,001 - £20,000	20	23	25
£20,001 - £50,000	64	66	66
£50,001 - £75,000	43	45	46
£75,001 - £100,000	14	14	12
£100,001 - £150,000	4	4	3
£150,001 - £200,000	1	2	2
over £200,000	3	3	3
	152	158	162

Independent Special Schools	Aug-25	Dec-25	Mar-26
£0- £5,000	2	4	6
£5,001 - £20,000	12	27	37
£20,001 - £50,000	105	125	120
£50,001 - £75,000	142	127	128
£75,001 - £100,000	65	73	70
£100,001 - £150,000	11	12	12
£150,001 - £200,000	1	0	0
over £200,000	2	1	1
	340	369	374

Independent Schools	Aug-25	Dec-25	Mar-26
£0- £5,000	4	5	6
£5,001 - £20,000	6	8	10
£20,001 - £50,000	9	10	10
£50,001 - £75,000	0	1	0
£75,001 - £100,000	0	0	0
£100,001 - £150,000	0	0	0
over £150,000	0	0	0
	19	24	26

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Mean average costs

Category	Description	July 2025 average annual cost (£ - HNB only)	September 2025 average annual cost (£ - HNB only)	December 2025 average annual cost (£ - HNB only)	March 2026 average annual cost (£ - HNB only)
Specialist	Independent Special School	67,377	66,301	65,121	64,032
Specialist	Specialist Post 16 Institute	51,774	56,621	56,466	58,129
Specialist	Dorset Special School	17,856	17,930	17,884	16,890
Specialist	Dorset Learning Centre - AP	6,067	6,067	9,638	8,448
Specialist	Dorset Learning Centre - SEMH	13,662	13,662	13,439	13,439
Mainstream	Further Education	3,541	3,541	3,907	4,101
Mainstream	Dorset Mainstream Top Up*	5,131	5,131	5,084	5,190
Mainstream	Specialist Provision in Mainstream	20,622	20,622	21,287	22,560

* Excludes notional SEN and per unit funding from the Schools Block (~£10k)

** Excludes notional SEN and per unit funding from the Schools Block (£6k~£10k)

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DSG Reserves (£)

	DSG Reserve - Pupil Growth	De- delegated schools budgets reserve	Early Years Reserve	Permanent Exclusions	TOTAL
Opening balance	1,011,593	102,684	1,027,244	437,698	2,579,219
Movements:					
Pupil Growth as agreed at SF	-16,174				-16,174
Trade Union facilities overspend		-13,427			-13,427
Early Years Expanded Entitlements grant			-167,988		-167,988
Primary Redundancy overspend		-16,252			-16,252
Other net movements				-101,147	-101,147
Funding for reintergrating excluded children					0
Funding from schools for excluded children				158,558	158,558
Closing balance	995,419	73,005	859,256	495,109	2,422,789

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Variance Analysis: Select High Needs Block budgets

	What was budgeted			What happened during the year end			Actual vs budget		Cause of the cost variance	
	Budgeted EHCP FTE numbers	Budget (£)	Budget Unit Cost (£)	Outturn EHCP FTE	£ 2026 Outturn	FTE Unit Cost (£)	Variance in numbers	Variance in Cost (£)	Volume Variance (£)	Price Variance (£)
	4,669									
Mainstream Funding										
Top up: Banding	1,537	7,773,270	5,057	1,677	8,610,529	5,134	(140)	(837,259)	(708,040)	(129,219)
Top up: Exceptional		2,633,791	2,633,791	186	2,807,344	15,109	(186)	(173,553)	-	-
Targeted SEND, Costed & Specialist Provision	172	4,136,020	24,047	293	5,769,548	19,668	(121)	(1,633,528)	-	-
OLA Top up: Banding or equivalent	60	374,667	6,244	73	686,295	9,401	(13)	(311,628)	(81,178)	(230,450)
Resourced Provision Funding										
Resourced Provision place funding:	162	1,054,333	6,508	219	1,302,167	5,946	(57)	(247,834)	(370,969)	123,135
Resourced Provision top up funding:	180	2,972,700	16,515	181	2,401,015	25,237	-	571,685	-	-
Independent Special School Placements	261	19,356,405	74,162	307	19,677,845	64,097	(46)	(321,440)	(3,411,474)	3,090,034
CiC Education Placements	20	2,162,867	108,143	18	2,610,078	145,004	2	(447,211)	216,287	(663,498)
Specialist Post 16 Institution Placements	106	6,441,796	60,772	128	7,430,604	58,129	(22)	(988,808)	(1,326,645)	337,837
Independent school Placements	17	419,144	24,656	21	424,781	20,554	(4)	(5,637)	(90,404)	84,768
Special Schools										
Special School place funding:	981	9,806,666	10,000	975	9,747,977	10,000	6	58,689	58,690	(1)
Special School top up funding:	1,015	17,395,484	17,138	847	15,404,168	18,181	168	1,991,316	2,874,293	(882,977)
Special School exceptional top up funding:	90	1,258,531	13,984	96	1,136,906	11,832	(6)	121,625	-	-
Other Local Authority Special School funding:	115	2,317,792	20,155	114	2,649,627	23,242	1	(331,835)	20,155	(351,990)
Coombe House Placements	152	8,136,000	53,526	133	8,239,824	61,954	19	(103,824)	1,017,000	(1,120,882)
Further Education Placements and top up	880	5,067,191	5,758	931	5,147,309	5,540	(51)	(80,118)	(293,667)	203,549
Learning Centre / AP	134	8,553,710	63,834	149	8,627,379	57,902				
Learning Centre place funding:	311	3,086,667	9,925	315	3,086,667	9,799	-	-	(39,700)	39,700
Learning Centre top up funding:	221	5,467,043	24,738	529	5,540,712	10,474	(309)	(73,669)	(7,619,227)	7,545,558
Learning Centre exceptional funding:	-	-	-	-	-	-	-	-	-	-
Other AP	-	-	-	-	-	-	-	-	-	-
Other	54	9,880,539			11,689,417		54	(1,808,878)	-	-
Pre-School Groups		567,967			208,682		-	359,285	-	-
TPG/TPECG		800,160			599,263		-	200,897	-	-
SEN Support Service Trading		-					-	-	-	-
Enhanced Health contributions		-					-	-	-	-
Recharges		206,926			206,926		-	-	-	-
		111,315,959			115,377,684			(4,061,726)		
		(60,208,139)			(60,208,139)			-		
		51,107,820			55,169,545			(4,061,726)		
		(51,107,820)			(55,169,545)					

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INDIVIDUAL SCHOOLS' BUDGET (ISB) OUTTURN FOR 2025-26
Summary of forecast school balances by phase

END OF YEAR SUMMARY

Final Outturn 2025-26*												
	Final Outturn				Per Pupil Amounts*			Number of Maintained Schools				
	Net Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	Minimum	Maximum	Average	Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	
Primary	£3,727,789	£(308,742)	£4,036,531	£2,033,738	£(1,161)	£1,793	£530	30	5	25	15	
Middle	£94,461	£(40,523)	£134,984	£43,380	£(170)	£435	£163	2	1	1	1	
Secondary	£1,574,563	£0	£1,574,563	£125,727	£50	£442	£273	6	0	6	1	
Special	£2,574,439	£0	£2,574,439	£1,328,743	£1,362	£8,470	£4,180	4	0	4	3	
Learning Centre	£2,238,322	£0	£2,238,322	£1,705,327	£2,786	£11,072	£8,175	3	0	3	3	
Total	£10,209,575	£(349,265)	£10,558,840	£5,236,915	£(1,161)	£11,072	£2,664	45	6	39	23	

Autumn Outturn 2025-26												
	Autumn Outturn Forecast				Per Pupil Amounts*			Number of Maintained Schools				
	Net Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	Minimum	Maximum	Average	Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	
Primary	£2,659,328	£(206,846)	£2,866,174	£919,030	£(1,236)	£1,718	£407	30	4	26	12	
Middle	£122,578	£0	£122,578	£7,345	£56	£465	£261	2	1	1	1	
Secondary	£1,429,698	£(405)	£3,240	£3,240	£(1)	£454	£234	6	1	5	1	
Special	£735,010	£(126,728)	£861,738	£256,847	£(551)	£4,627	£1,514	4	1	3	1	
Learning Centre	£1,578,224	£0	£1,578,224	£890,782	£2,615	£8,728	£5,671	3	0	3	2	
Total	£6,524,837	£(333,979)	£5,431,954	£2,077,244	£(1,236)	£8,728	£1,617	45	7	38	17	

Final Outturn 2024-25												
	Autumn Outturn Forecast				Per Pupil Amounts			Number of Maintained Schools				
	Net Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	Minimum	Maximum	Average	Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	
Primary	£3,110,367	£(209,542)	£3,319,909	£1,258,960	£(1,260)	£1,831	£500	30	3	27	16	
Middle	£173,229	£0	£173,229	£0	£261	£387	£324	2	0	2	0	
Secondary	£1,736,542	£(107,520)	£1,844,063	£240,888	£(91)	£464	£238	6	1	5	2	
Special	£1,379,110	£(489,074)	£1,868,184	£908,445	£(2,329)	£7,245	£2,678	4	1	3	3	
Learning Centre	£1,649,905	£0	£1,649,905	£1,116,911	£5,631	£6,405	£6,034	3	0	3	3	
Total	£8,049,153	£(806,136)	£8,855,290	£3,525,204	£(2,329)	£7,245	£1,955	45	5	40	24	

£2,160,422												
Autumn Outturn 2024-25												
	Projected Outturn				Per Pupil Amounts*			Number of Maintained Schools				
	Net Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	Minimum	Maximum	Average	Total	Deficit Balances	Surplus Balances	of which Excess Surplus Balances	
Primary	£2,043,888	£(227,707)	£2,271,595	£823,621	£(1,428)	£1,558	£290	30	5	25	15	
Middle	£67,577	£0	£67,577	£145,352	£64	£200	£132	2	1	1	1	
Secondary	£1,375,959	£0	£1,375,959	£468,722	£0	£404	£160	6	0	6	1	
Special	£664,294	£(467,075)	£1,131,369	£737,948	£(2,224)	£4,964	£1,610	4	0	4	3	
Learning Centre	£682,708	£0	£682,708	£204,517	£2,010	£2,876	£2,520	3	0	3	3	
Total	£4,834,425	£(694,782)	£5,529,207	£2,380,160	£(2,224)	£4,964	£531	45	6	39	23	

Financial Year		2025-26	2024-25	2023-24
Surpluses	Autumn Forecast	£5,431,954	£5,529,207	£5,130,260
	Actual Outturn	£10,558,840	£8,855,290	£7,842,806
	Forecast as % of actual	51%	62%	65%
	Actual v Forecast	£5,126,886	£3,326,083	£2,712,546
Deficits	Autumn Forecast	£(333,979)	£(894,782)	£(714,351)
	Actual Outturn	£(349,265)	£(806,136)	£(758,773)
	Forecast as % of actual	96%	86%	94%
	Actual v Forecast	£(15,286)	£(111,354)	£(44,422)
Net Total	Autumn Forecast	£6,524,837	£4,834,425	£4,415,908
	Actual Outturn	£10,209,575	£8,049,154	£7,084,033
	Forecast as % of actual	64%	60%	62%
	Actual v Forecast	£3,684,738	£3,214,728	£2,668,124

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Dorset Schools' Forum

Date of Meeting:	3 July 2026
Report Title:	Funding formulae for 2027-28: Timetable for Consultation
Executive Director:	Paul Dempsey, Executive Director for People - Children
Corporate Director:	Jen Furnell, Corporate Director Education & Learning
Report Author: Title: Tel: Email:	Ross Bowell Head of Service – Health, Education and SEND Commissioning 01305 225535 ross.bowell@dorsetcouncil.gov.uk
Presenting Officer:	Ellen Eager, Sufficiency and Funding Manager Health, Education & SEND Commissioning, Commissioning and Partnerships, People – Children Directorate
Report Status:	Public
Reason for Submission to Schools' Forum:	For CONSULTATION Under Forum power/responsibilities: 1(b) (i), (ii), (vii), (viii), (x), (xi) Central spend on Pupil Growth; Admissions; Central Spend on Early Years Block (EYB) Provision; servicing of Schools' Forum, and contribution to responsibilities local authorities hold for all schools 2(a) formula changes including redistributions of school and early years funding 2(b)(iv) administering the allocation of central government grants paid to schools via the local authority. 2(d) such other matters concerning the funding of schools which the LA sees fit 2(f) 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.
Recommendation(s):	That Schools' Forum: Page 59

	• notes the proposed timeline for consultation for Dedicated Schools Grant Funding formulae for 2027/28. • Provides feedback on the proposal for a mainstream working group
Reason for Recommendation(s):	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 This report sets out the proposed timeline for consultation for Dedicated Schools Grant Funding formulae for 2027/28.	
2. Financial Implications None	
3. Climate Implications None	
4. Other implications None	
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 - The Use and Impact of Mainstream Specialist Funding in Dorset (2025/26)	
8. Background Papers	

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

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.

Report:

This report sets out the proposed timeline for consultation for Dedicated Schools Grant Funding formulae for 2027-28.

Schools' Forum consultation timelines are in large part dictated by:

- the publication of information (e.g. Provisional DSG allocations usually in the 3rd week of December and Early Years Funding Rates usually in late November) and
- deadlines for submission of information (e.g. the Authority Proforma Tool to the DfE by 3rd week in January and funding statements to early years' providers by the end of February.

The table below sets out the expected consultation dates through Forum. These dates are provisional and can be affected by changes to publication dates and submission deadlines, as well as by any changes in regulations relating to Dedicated Schools Grant funding or the operation of Schools Forum.

Block	Formulae	Meeting
Schools	Exceptional Circumstances	06 November 2026
Schools	De-delegation (maintained)	06 November 2026
Schools	Education functions	06 November 2026
Schools	Block transfer (if requested)	06 November 2026
Schools	Main formula elements	15 January 2027
Early years	All	15 January 2027
Central Services	All	15 January 2027
High needs	All	26 March 2027

Officers also work with specific groups through the year to inform the formal Forum consultations and the effective, efficient allocation of funding through the DSG formulae, e.g. the DALCH – Learning Centre Heads, Special School heads through SSHAD, and the Early Years Reference Group.

We propose to add a mainstream school working group during 2026-27, initially focused on the High Needs Block and SEND reform, specifically on reviewing top-up funding methodologies including banding, costed provision, exceptional funding and mainstream specialist top-ups. We would appreciate feedback on this proposal from Forum members.

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The Use and Impact of Mainstream Specialist Funding in Dorset (2025/26)



Dorset
Council

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Executive Summary

Background

In response to increasing pressure on specialist provision and a sustained rise in the number of children and young people (CYP) presenting with complex special educational needs and disabilities (SEND), Dorset Council developed a Mainstream Specialist exceptional funding model to support CYP with needs typically associated with specialist provision to allow them to remain in, or access, education within mainstream settings.

To understand how this funding has been used in practice, its impact, and its limitations, Dorset Council commissioned a consultant-led survey of mainstream schools and settings that had accessed Mainstream Specialist exceptional funding during the 2025–26 financial year. This report presents the findings of that review and considers the implications for future SEND system planning.

Key Findings

The review found that Mainstream Specialist exceptional funding has played a significant and positive role in enabling schools to support CYP with complex needs, particularly in relation to:

- ▶ Stabilising placements and reducing the risk of exclusion
- ▶ Improving regulation, engagement and attendance
- ▶ Enhancing staff confidence and capacity
- ▶ Supporting more inclusive practices across schools; and
- ▶ Benefitting peers and the wider school environment

Schools have used the funding to provide enhanced, short-term or exceptional support where ordinarily available provision and standard SEND funding mechanisms were

not sufficient to meet need. Funding has been used for additional staffing, bespoke provision, specialist equipment, targeted interventions, training, and, in some cases, access to alternative provision.

Many schools reported that, without access to this funding, placements would have been at high risk of breakdown.

However, the review also identified clear limitations in the current approach. While the funding has often been effective as a short-term or mitigating measure, it has not consistently enabled schools to meet need fully or sustainably for CYP with specialist-level needs.

Profile of Need

The CYP supported through Mainstream Specialist exceptional funding represent a diverse but highly complex cohort. Although individual profiles vary, common features include:

- ▶ Significant cognition and learning difficulties (including MLD, SLD and SpLD)
- ▶ Communication and interaction needs, including autism and sensory processing differences
- ▶ Social, Emotional and Mental Health needs, often linked to trauma or anxiety
- ▶ Mixed or overlapping SEND profiles requiring intensive adult support and environmental adaptation

Many CYP supported through this funding spend a substantial proportion of their time outside of mainstream classrooms, accessing bespoke or alternative spaces within the school day. This reflects the reality that, even with enhanced staffing, mainstream classroom environments are not always suitable for CYP with specialist-level needs.

Use of Funding

Schools reported that the funding was most commonly used to:

- ▶ Employ additional staff, particularly teaching assistants and HLTAs
- ▶ Create bespoke, specialist-in-mainstream provision or small group bases
- ▶ Purchase specialist equipment and resources, particularly sensory and communication supports
- ▶ Deliver targeted interventions and therapeutic programmes
- ▶ Access training and external specialist support

While some schools were able to use the funding creatively to develop structured, high-quality provision, others reported that staffing shortages, space constraints and uncertainty about funding timescales limited what could realistically be achieved.

The reliance on 1:1 staffing was a notable feature across responses, reflecting both the complexity of need and the absence of alternative specialist infrastructure within mainstream settings.



Impact and Effectiveness

Overall, schools reported that Mainstream Specialist exceptional funding had a largely positive impact, particularly in relation to:

- ▶ Improved emotional regulation and readiness to learn
- ▶ Increased attendance and engagement
- ▶ Reduced suspensions and exclusions
- ▶ Improved safety and wellbeing for CYP and peers; and
- ▶ Enhanced inclusion and whole-school practice

Funding has been used reactively rather than to deliver a fully appropriate, long-term educational offer for CYP with specialist needs. In several cases, schools reported that despite best efforts, the needs of some CYP exceeded what could reasonably be delivered within a mainstream environment, even with enhanced funding.

“The flexibility this funding comes with allows us as a school to be more responsive and dynamic with the support and provision we put into place for the children.”

Leif Overment, Headteacher,
Salway Ash CE VA Primary

“Exceptional top-up funding has value and impact, but its effectiveness is maximised when it sits within a system that is open, equitable and aligned with shared expectations about inclusion.”

Gary Spracklen, Headteacher,
The Prince of Wales

Challenges and Limitations

The review identified recurring challenges, including:

- ▶ Recruitment and retention of suitably skilled staff
- ▶ Physical space constraints, limiting the ability to create appropriate learning environments
- ▶ Funding sufficiency and timeliness, affecting planning and sustainability
- ▶ Overreliance on 1:1 staffing, limiting independence and inclusion
- ▶ Limited access to suitable alternative provision
- ▶ CYP with needs incompatible with mainstream environments, even with significant adaptation

These challenges were consistently raised across phases and localities and point to structural issues rather than isolated school-level practice.

Strategic Implications

The findings suggest that whilst the provision of Mainstream Specialist exceptional funding has been an important and valuable measure, it is insufficient as a long-term solution to increasing levels of specialist need within mainstream education.

The evidence indicates a need to move away from a predominantly reactive, individualised funding approach towards a planned, differentiated system of specialist-in-mainstream provision, supported by appropriately resourced specialist bases, development of skilled and stable workforces, predictable funding arrangements and strengthened sufficiency across the SEND system, including support for schools and settings to deliver a more inclusive offer as part of their ordinarily available provision. These measures align with the ideas expressed in the recent SEND White Paper *Every Child Achieving and Thriving, 2026*.

Key recommendations include:

- ▶ The development of Inclusion Bases to support different areas of need
- ▶ Improved alignment between mainstream, specialist and alternative provision
- ▶ A reduction in reliance on exceptional funding through the creation of sustainable specialist capacity and more effective ordinarily available provision

Purpose and Scope

The purpose of this review is to evaluate the use, impact and effectiveness of Mainstream Specialist exceptional funding provided to mainstream schools and settings to support children and young people (CYP) with complex special educational needs and disabilities (SEND).

Funding was introduced to respond to a growing cohort of CYP whose needs are typically associated with specialist provision, but who are educated within mainstream settings due to local sufficiency pressures, parental preference, or as part of a planned inclusion approach.

In these circumstances, the intention of the funding is to provide enhanced, time-limited or exceptional support where ordinarily available provision and standard SEND funding mechanisms are not sufficient to meet need.

This review seeks to understand:

- ▶ How schools have used Mainstream Specialist exceptional funding in practice
- ▶ The extent to which the funding has enabled CYP to access education safely and effectively
- ▶ The impact of the funding on CYP, peers, staff and the wider school environment
- ▶ The strengths and limitations of the current approach
- ▶ The implications for future SEND system planning and sufficiency

The review is intended to inform strategic decision-making by Dorset Council, support continuous improvement in SEND provision, and contribute to the development of a more sustainable and equitable system of support for CYP with complex needs.

The review includes all mainstream schools and settings in Dorset that accessed Mainstream Specialist exceptional funding during the 2025–26 financial year and that responded to the survey conducted between February and April 2026.

The review considers:

- ▶ The profile and complexity of CYP supported through the funding
- ▶ The range of provision put in place by schools, including staffing, resources, interventions and bespoke arrangements
- ▶ How funding has been used alongside other support mechanisms, including EHCP provision, outreach services and alternative provision
- ▶ Reported outcomes and impacts for CYP and schools
- ▶ Challenges encountered by schools in implementing provision
- ▶ Variability in practice and experience across settings

The review draws on both quantitative and qualitative survey responses and follow-up interviews to provide a balanced picture of how the funding has been deployed and experienced across the system.

It is important to be clear about the limits of this review. This report does **not**:

- ▶ Evaluate the quality of individual school provision in detail
- ▶ Assess compliance with EHCPs or statutory processes at a case level
- ▶ Provide a cost-benefit analysis of individual placements
- ▶ Replace or duplicate formal quality assurance, inspection or audit processes
- ▶ Act as a commissioning business case for specific types of provision

While references are made to wider system developments and future models of provision, these are considered in the context of responding to the findings of the review, rather than as the primary focus of the report.

Methodology

To inform the review, a structured survey was issued to all mainstream schools and settings that had accessed Mainstream Specialist exceptional funding. The survey gathered information on:

- ▶ The needs and profiles of CYP supported
- ▶ How the funding was used
- ▶ The perceived impact on CYP, peers and staff
- ▶ Challenges and barriers to effective implementation
- ▶ Views on the appropriateness and sustainability of the funding model
- ▶ Suggestions for improvement and future development

Responses included both closed questions and open-ended qualitative feedback, allowing schools to provide detailed reflections on their experiences. Follow-up interviews were conducted with some respondents to gather additional insights.

While the response rate was strong and provided a rich evidence base, it should be noted that responses reflect self-reported perceptions from schools, experiences may vary depending on context, phase and cohort and the review captures a snapshot in time rather than long-term longitudinal outcomes.

It should also be noted that this review sits within a broader context of SEND system development in Dorset and national developments relating to the February 2026 release of the SEND White Paper, *Every Child Achieving and Thriving*.

The findings of this review should therefore be considered alongside wider strategic work to strengthen inclusion, improve outcomes for CYP with SEND, and ensure the long-term sustainability of local provision.



The National and Local Context

Introduction

Nationally, the education system continues to experience sustained pressure in relation to special educational needs and disabilities (SEND).

Over recent years, there has been a significant increase in both the number of children and young people (CYP) with Education, Health and Care Plans (EHCPs) and the complexity of need being supported within mainstream settings.

Across England, local authorities and schools report rising demand for specialist placements, particularly for CYP with autism, Social, Emotional and Mental Health needs, and complex cognition and learning profiles; increasing numbers of CYP requiring alternative or non-standard educational arrangements; challenges in recruiting and retaining suitably skilled SEND staff across all phases; and escalating costs within High Needs Blocks, driven by placement costs, transport and bespoke provision.

These pressures have contributed to a widening gap between demand for specialist provision and available capacity, resulting in more CYP with specialist-level needs being educated in mainstream settings for extended periods of time.

The White Paper

The Government's SEND and Alternative Provision Improvement Plan, *Every Child Achieving and Thriving* (DfE, 2026), sets out a national ambition to create a more inclusive, consistent and sustainable SEND system. The plan emphasises that:

- ▶ Mainstream schools should be supported to play a stronger role in meeting SEND
- ▶ Inclusion must be underpinned by the right expertise, environments and support
- ▶ Reliance on exclusion and unplanned alternative provision should be reduced
- ▶ Specialist provision should be reserved for CYP whose needs cannot reasonably be met in mainstream settings
- ▶ Local authorities should develop clearer, planned SEND systems with stronger early intervention and graduated responses

Crucially, the Improvement Plan recognises that mainstream inclusion is not cost-neutral, and that schools cannot be expected to meet increasingly complex needs without appropriate infrastructure, specialist support and funding. It also acknowledges that, in the absence of sufficient planned provision, systems can drift towards reactive and individualised solutions that are difficult to sustain.

The policy direction therefore reinforces the need for well-planned, specialist provision in mainstream settings, clearer pathways between mainstream and specialist settings, and more consistent local approaches to supporting CYP with complex needs.

The Role of Mainstream Schools and Settings in Supporting Specialist Need

Within this national context, mainstream schools are increasingly supporting CYP whose needs would previously have been met within specialist settings.

This reflects a combination of factors, including insufficient specialist provision capacity, parental preference for local education and continuity, efforts to promote inclusive practice in line with national policy and the need to avoid prolonged periods out of education while awaiting specialist placements.

However, the complexity of need now seen in mainstream settings often goes beyond what can reasonably be met through ordinarily available provision alone. As a result, many schools are required to put in place highly individualised and resource-intensive arrangements, such as 1:1 staffing or intensive adult support, bespoke learning spaces or out-of-class provision and significantly adapted curricula.



Local Context in Dorset

These national trends are clearly reflected locally within Dorset. The local authority continues to see:

- ▶ An increase in the number of CYP with EHCPs
- ▶ Greater complexity within SEND profiles, including overlapping cognition and learning, communication and interaction, and SEMH needs
- ▶ Sustained pressure on special school capacity across phases
- ▶ Increased use of alternative provision and bespoke educational arrangements
- ▶ Ongoing financial pressure within the High Needs Block

At the same time, Dorset has a strong strategic commitment to inclusion and to enabling CYP to be educated as close to home as possible, where this is appropriate and in their best interests. In line with national expectations, mainstream schools in Dorset are therefore supporting an increasing number of CYP with needs that are typically associated with specialist provision.

In many cases, this has required schools to adapt their environments, staffing structures and curriculum offer well beyond what would ordinarily be expected within a mainstream context.

In Dorset, the Mainstream Specialist exceptional funding route was developed primarily as a targeted response to support CYP with complex needs to remain in mainstream settings. Funding has enabled schools to:

- ▶ Employ additional staff to provide intensive support
- ▶ Create bespoke or specialist in mainstream provision
- ▶ Purchase specialist resources and equipment
- ▶ Deliver targeted interventions and therapeutic programmes
- ▶ Access external expertise and training

Mainstream Specialist exceptional funding has also been used to support inclusion, maintain stability, and prevent placement breakdown or exclusion for CYP whose needs cannot be met in mainstream over the long term, creating time for planning and decision-making.

As pressures on specialist provision have continued, the duration and intensity of support required through exceptional funding has increased. In some cases, arrangements initially intended to be short-term have become longer-term, raising questions about sustainability, equity and alignment with the national ambition for a more planned SEND system.

Tensions

The increased reliance on – and acceleration in applications for – Mainstream Specialist exceptional funding in Dorset highlights broader system tensions, including:

- ▶ The balance between inclusion and appropriateness of placement
- ▶ The extent to which mainstream environments can be adapted to meet specialist level needs
- ▶ The sustainability of highly individualised, schooled solutions
- ▶ Equity of access to enhanced support across schools and localities
- ▶ The interaction between exceptional funding, specialist provision and alternative provision

These tensions are recognised within national policy and form an important backdrop to the findings of this review. They help to explain both the positive impact of the funding and the challenges reported by schools.

Understanding this national and local context is essential to interpreting the findings of the review. The use of Mainstream Specialist exceptional funding cannot be considered in isolation from wider SEND system pressures, nor can the experiences of individual schools be separated from the structural constraints within which they are operating.

The Specialist Mainstream Cohort

Children and young people (CYP) supported through the Mainstream Specialist exceptional funding route represent a small but highly complex cohort within mainstream education. The cohort is not a single, homogenous group but includes CYP with a range of primary and overlapping needs, often requiring highly individualised and resourceintensive support.

Primary Areas of Need

Analysis of survey responses suggests that CYP supported fall into three, often overlapping, categories of need.

1. Cognition and Learning

A significant proportion of CYP supported through the funding have cognition and learning (C&L) needs, including:

- ▶ Moderate Learning Difficulties (MLD)
- ▶ Severe Learning Difficulties (SLD)
- ▶ Specific Learning Difficulties (SpLD), particularly where these are compounded by broader developmental delay
- ▶ Difficulties with memory, processing, attention and executive functioning

These CYP often require:

- ▶ Highly structured and cumulative teaching approaches
- ▶ Significant curriculum adaptation
- ▶ Repetition, overlearning and scaffolding
- ▶ Targeted literacy and numeracy intervention
- ▶ Support to develop independence and generalisation of skills

For many, progress within a standard mainstream curriculum is limited without substantial adaptation.

2. Communication and Interaction

A second significant group within the cohort are CYP with Communication and Interaction (C&I) needs, including:

- ▶ Autism Spectrum Condition
- ▶ Social communication difficulties
- ▶ Language and communication delay
- ▶ Sensory processing differences

These CYP experience difficulty accessing mainstream classrooms due to:

- ▶ Sensory overload
- ▶ Communication barriers
- ▶ Anxiety linked to unpredictability or social interaction
- ▶ Difficulty understanding and engaging with classroom expectations

As a result, they often require:

- ▶ Low-arousal environments
- ▶ Structured routines and visual supports
- ▶ Explicit teaching of communication and social skills
- ▶ Opportunities for predictable, supported interaction with peers

3. Social, Emotional and Mental Health (SEMH)

A third group of CYP supported through the funding present with Social, Emotional and Mental Health (SEMH) needs, often alongside other areas of need. These may include:

- ▶ Anxiety, including schoolbased anxiety or emotionally based school avoidance
- ▶ Trauma-related behaviours
- ▶ Difficulties with emotional regulation
- ▶ Behaviour that challenges, often linked to unmet need or dysregulation
- ▶ Attachment difficulties

These CYP often require:

- ▶ Highly consistent, relational adult support
- ▶ Structured and predictable environments
- ▶ Opportunities for regulation throughout the day
- ▶ Adapted expectations and flexible approaches to learning
- ▶ Integrated pastoral and therapeutic input

It should be noted that most CYP have needs that cut across more than one area, reflecting significant neurodiversity in this cohort. For example, a CYP with cognition and learning needs may also present with SEMH needs linked to frustration, low self-esteem or anxiety, whilst a CYP with communication and interaction needs may also experience sensory regulation difficulties and emotional dysregulation.

This complexity means that provision cannot be effectively planned or delivered in isolation by need type alone. Instead, schools are required to respond to interconnected and evolving profiles, often with limited access to specialist expertise on a daytoday basis.



The Challenge of Mainstream Inclusion

Whilst the Specialist Mainstream funding was designed to support CYP to remain with their peers in their local school, several schools report that this has required significant adaptation, including high levels of adult support, removal from mainstream classrooms for part of the day and creation of bespoke or specialist-in-mainstream provision.

A consistent and important finding is that many of these CYP are not accessing the mainstream classroom full-time. Indeed, a significant minority of survey responses indicate that many CYP spend much of their time in small group or bespoke provision whilst others access mainstream learning only for limited periods. Only a minority can sustain full-time access to mainstream classrooms without substantial support.

This reflects the reality that for many CYP in this cohort, the structure, pace and sensory demands of a typical mainstream classroom present significant barriers to learning and engagement. As a result, schools are frequently required to develop hybrid models of provision, combining access to mainstream education with more specialist, adapted approaches delivered outside the classroom.

Implications of the Cohort Profile

The profile of CYP supported through the Mainstream Specialist exceptional funding route has several important implications:

- ▶ Provision must address multiple, overlapping areas of need, rather than focusing on a single primary need
- ▶ Successful support often depends on the availability of adapted environments, not just additional staffing
- ▶ The overwhelming reliance on individualised, 1:1 support reflects underlying structural gaps in provision, rather than preferred practice
- ▶ Mainstream schools are increasingly required to deliver elements of specialist provision within their settings



How Have Schools Used Mainstream Specialist Funding?

Survey responses demonstrate that exceptional funding has been used by schools in a range of flexible and adaptive ways to meet the needs of CYP with complex SEND. While there is variation between settings, clear and consistent patterns have emerged.

The funding has most commonly been used to:

- ▶ Employ additional staffing to provide intensive support
- ▶ Establish bespoke or specialist-in-mainstream provision
- ▶ Deliver targeted interventions and therapeutic programmes
- ▶ Purchase specialist equipment and resources
- ▶ Access training and external expertise

These uses reflect the need for layered and responsive provision, rather than a single intervention or approach.

“The children accessing this provision are settled and happy coming into school. They are making progress academically and with social communication.”

Sally Howard, SENDCo,
Shaftesbury Abbey Primary

Teaching Assistants

The most common use of exceptional funding has been to recruit additional staff, particularly Teaching Assistants (TAs) and Higher-Level Teaching Assistants (HLTAs). In many schools, this staffing has been deployed to provide:

- ▶ 1:1 support for individual CYP
- ▶ Targeted small-group support
- ▶ Supervision and support during transitions and unstructured times
- ▶ Facilitation of access to both mainstream and bespoke provision

The reliance on 1:1 staffing is a notable feature across responses. This reflects both the intensity of need within the cohort and the absence of consistent alternative models of provision within mainstream settings.

However, schools also report that while 1:1 support can be effective in maintaining safety and engagement, it is not always the most sustainable or developmentally appropriate model, particularly where it may limit independence or peer interaction over time. This chimes with guidance from the Education Endowment Foundation (*Making Best Use of Teaching Assistants*, EEF 2015), which warns against over-reliance on one-to-one teaching assistant support, highlighting the risk of reduced independence, separation from the teacher, and lower attainment outcomes.

Bespoke Provision

A significant number of schools have used the funding to create bespoke provision within their setting, effectively establishing small-scale, specialist-in-mainstream environments. These provisions typically include dedicated teaching or intervention spaces, small group teaching models, adapted timetables and curriculum pathways. Structured routines and low-arousal environments and targeted support for regulation, communication and learning.

In many cases, these arrangements resemble elements of specialist provision, delivered within a mainstream context. Schools reported that this approach can be highly effective where staffing is sufficiently stable, where skilled and appropriate physical space is available and where provision is planned and structured, rather than reactive.

However, the ability to develop such provision varies significantly between schools, depending on factors such as building capacity, staffing and leadership and the ready availability of external specialist advice.

“The YP is more settled and has longer periods of emotion regulation due to the bespoke nature of the provision and reduced demand.”

Jill Watson, Headteacher,
St Nicholas CE Primary

Targeted Interventions and Programmes

Alongside providing support and creating enabling environments, schools have also used the funding to implement a range of targeted interventions and structured programmes as part of a broader package of support, particularly in relation to literacy and numeracy development, communication and language skills, emotional regulation and wellbeing, social skills and interaction and attention, processing and executive functioning.

In many schools, structured literacy and phonics programmes, precision teaching approaches, social and emotional interventions (such as ELSA or nurture-based provision) and communication-focused interventions supported by speech and language professionals have been implemented, benefiting not only the CYP in receipt of funding but also a wider cohort.



“It has enabled both of these children to manage their emotions and cope with being in a mainstream school... less escalation of emotions and behaviour.”

Sarah Wanless, SENDCo,
St Ives Primary and Nursery

Specialist Equipment

In a small number of cases, funding has also been used to procure specialist equipment and resources to support better access to learning.

Sensory equipment (e.g. weighted resources, sensory tools, low-arousal furnishings), communication aids and visual supports, adapted furniture and workstations, assistive technology and resources to support structured and independent learning have played a critical role in enabling CYP to engage in learning by reducing sensory overload, supporting communication and promoting independence.

Targeted Professional Development

Many schools have made use of training to build expertise in autism awareness and good practice, communication and language development, trauma-informed and relational approaches, behaviour and regulation strategies and cognition and learning interventions. Much of this support has been accessed from Dorset Council Educational Psychologists and Specialist Teachers, NHS Speech and Language or Occupational Therapists and TADSS Outreach services.

School leaders who have accessed such training report that targeted professional development has contributed to increased staff confidence and capability, though they also report that access to specialist input can be variable and is often constrained by wider system capacity.



Alternative Provision

In some cases, and mostly in the secondary phase, schools have used the funding to support access to alternative provision (AP) or to develop hybrid models, where CYP access provision across multiple settings. This includes:

- ▶ Part-time placement in alternative provision
- ▶ Combination of mainstream and offsite support
- ▶ Bespoke packages combining education and therapeutic input

While this approach can be appropriate in specific circumstances, schools report that suitable AP placements are limited, costs can exceed available funding and provision may not always align with the complexity of need. In addition, there is evidence that many CYP accessing AP are not receiving a full-time offer of education. As a result, AP is often used as a complementary or interim solution, rather than a sustained long-term approach.



Variation in Approach and Efficacy

Although common patterns are evident, there is significant variation in how funding is used across schools, influenced by the profile of CYP supported, the availability of staffing and expertise, the physical space within the school, leadership decisions and local context and ready access to external services.

Some schools have developed highly structured, sustainable models of provision, while others have been more reliant on individualised and reactive approaches, reflecting the challenges of meeting complex need within a mainstream environment, particularly in the secondary phase.

Overall, the use of Mainstream Specialist exceptional funding illustrates that:

- ▶ Schools are employing a wide range of strategies to meet complex and varied need
- ▶ There is a strong reliance on additional staffing, particularly 1:1 support
- ▶ Where possible, schools are creating small-group, bespoke provision models
- ▶ Effective provision typically requires a combination of staffing, environment, intervention and training
- ▶ Variability in implementation reflects underlying differences in capacity, context and agency

Impact of the Funding

Mainstream Specialist exceptional funding has had a significant and largely positive impact on children and young people (CYP), as well as on the wider school environment.

Schools consistently report that the funding has enabled them to maintain placements that would otherwise have been at risk of breakdown, improve the safety, wellbeing and engagement of CYP, reduce disruption and improve outcomes for peers and develop more inclusive practices and provision models.

In many cases, schools highlight that, without access to this funding, they would have been unable to meet need and that the likelihood of exclusion or placement breakdown would have been substantially increased.

Impact on Children and Young People

The most frequently reported impact of the funding relates to improvements in regulation, engagement and readiness to learn. Schools described

- ▶ Increased emotional stability and reduced dysregulation
- ▶ Improved attendance and engagement with education
- ▶ Greater consistency in daily routines and experiences
- ▶ Increased feelings of safety and security within the school environment
- ▶ Improved ability to access learning, particularly where provision was adapted

For some CYP, particularly those with SEMH or communication and interaction needs, the funding has enabled re-engagement with education, including transitions from part-time timetables or periods of absence back into more consistent attendance.

“Children’s attendance is over 90% consistently and they are not being suspended. Children are making progress academically.”

Elly Layfield, SENDCo,
Dorchester Middle School

For those with cognition and learning needs, the funding has supported progress in basic literacy and numeracy skills, communication and understanding, independence and self-management. However, it is important to note that in many cases, progress is described as incremental and developmental, reflecting the complexity of need within the cohort. For some CYP, the most significant impact has been stabilisation, rather than rapid academic progress.

“The funding has supported some of the children to get into a ‘just right state’ for learning... meaning more children receive the support.”

Aimee Bowles, SENDCo,
Bridport Primary School

Impact on Inclusion

A key strength of the Mainstream Specialist exceptional funding – and its defining purpose – has been its role in preventing placement breakdown and exclusion. Schools repeatedly report that CYP who might otherwise have been permanently excluded have been successfully retained in mainstream settings. Funding has enabled schools to manage behaviour that challenges in a more structured and supportive way, with placements stabilised during periods of high need or transition.

In this respect, the funding has made an important contribution to reducing suspensions and exclusions, maintaining CYP within their local communities and supporting continuity of education. This aligns with national policy priorities to reduce reliance on exclusion and to strengthen inclusive practice within mainstream education.

“Reports from parents... their child communicates that they have friends now... they laugh and interact in a fun and fulfilling way.”

Christine Goodall, SENCo, Downlands
Community Primary

Wider Impact

Schools also highlight the wider benefits of the funding. These include reduced disruption within classrooms, improved learning environments for peers, increased capacity for staff to support the whole class and a strengthened inclusive ethos within the school.

By providing additional support for CYP with complex needs, schools report that they are better able to maintain calm and structured learning environments, support a broader range of learners effectively and reduce the impact of significant need on other pupils. In this sense, the funding has contributed to whole-school improvement, rather than benefiting individual CYP alone.

The impact on staff confidence and professional practice was also noted by respondents. Schools report that access to additional funding has enabled increased adult presence to manage complex situations, opportunities for staff to develop skills through training and collaboration, greater confidence in supporting CYP with high levels of need and improved consistency of approach across staff teams.

Where funding has supported access to specialist training or external expertise, schools note that this has had a lasting impact on staff capability, including improved understanding of SEND profiles, more effective use of strategies for regulation and communication and increased use of structured and evidence-based interventions. However, schools also indicated that confidence is often conditional, depending on the availability of staffing, training and external support.

“Helped both staff and targeted pupils and parents with their mental health and sense of belonging as we can keep them in school, on track and generally happy and learning.”

Louise Greenham,
Head of School, Damers First School.

Opportunities and Limitations

In some schools, Mainstream Specialist exceptional funding has acted as a catalyst for wider changes in practice, including:

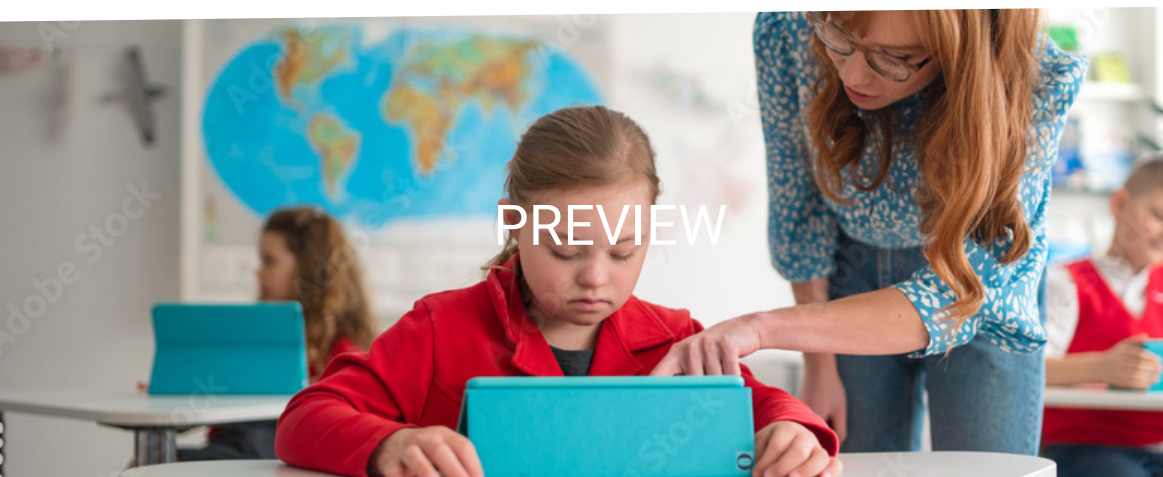
- ▶ The development of small-group or specialist-in-mainstream provision
- ▶ Increased use of adapted teaching approaches
- ▶ Greater focus on regulation, wellbeing and readiness to learn
- ▶ Improved collaboration with external professionals

These developments demonstrate that, where implemented effectively, funding has had the potential to contribute to longer-term improvements in inclusion, rather than simply addressing immediate need.

However, whilst the overall impact of the funding has been positive, it is important to highlight the limitations reported by schools.

Funding is often viewed as enabling the management and containment of need, rather than fully meeting it. A small but significant number of schools report that progress for some CYP has been constrained by the limitations of mainstream environments and that the effectiveness of provision has been heavily dependent on staffing availability and expertise.

Despite significant levels of funding, some CYP have required levels of support that are difficult to sustain in mainstream settings. For CYP with the most complex profiles, schools report that even with exceptional funding, their mainstream setting is not the most appropriate long-term placement as provision rely heavily on individual staff members rather than systemic approaches and opportunities for full inclusion in classroom learning is limited.



In summary, Mainstream Specialist exceptional funding has:

- ▶ Had a clear and positive impact on CYP, particularly in relation to regulation, engagement and stability
- ▶ Played a critical role in preventing exclusion and maintaining placements
- ▶ Contributed to improved outcomes for peers and the wider school environment
- ▶ Supported staff development and increased confidence
- ▶ Enabled some schools to develop more inclusive and adaptive models of provision

However, the impact is often focused on stabilisation rather than transformation, provision has relied heavily on additional staffing and local adaptation and for some CYP, needs continue to exceed what some schools feel can reasonably be delivered in mainstream settings, even with enhanced funding.

“It works for some children, but not others.”

Chris Perry, Headteacher,
Cheselbourne Village School



Effective Practice

Alongside the challenges identified, clear and encouraging examples of effective practice have emerged. These illustrate how Mainstream Specialist exceptional funding has and can be used to deliver meaningful and impactful provision when supported by appropriate conditions, including staffing, space and leadership.

Across responses, successful practice is characterised by a shift away from purely reactive, individualised support towards more structured, planned and collective approaches to meeting need.

Bespoke Provision

One of the strongest areas of effective practice is the development of small-group, specialist-in-mainstream provision. A growing number of schools have been able to move beyond a solely 1:1 support model and establish dedicated provision spaces, small teaching groups, structured routines and adapted curricula, often mounted with support from local Special schools.

These schools report significantly improved outcomes for CYP, with successful provision typified by reduced sensory demand and more predictable environments, targeted teaching aligned to CYP developmental stage rather than age, opportunities for over-learning and repetition and a balance between specialist support and access to mainstream experiences. These approaches are consistently described by schools as more educationally effective and financially sustainable than purely individualised support.

“Children who would not have had a specialist place... have been able to have the provision they need within a local setting... attend the same school as their siblings. The impact... has been fantastic.”

Lisa Thompson, Head of School, Sherborne Abbey CE Primary

Culture Change

Schools that have prioritised emotional regulation, wellbeing and readiness to learn as a foundation for provision have also reported more positive outcomes. Most of these schools do not report having put in place bespoke arrangements but, instead, have developed whole school approaches, such as structured opportunities for regulation throughout the day, the development of consistent adult relationships and clear routines, use of low-arousal spaces and sensory supports and the explicit teaching of self-regulation strategies.

In some of these settings, impact is seen not only in behaviour but also in improved attendance, increased engagement and greater capacity for learning over time. This reflects a shift towards a more developmental and needs-led approach, rather than a solely behavioural or academic focus.

Some schools note that this change of focus was backed by investment in staff training and professional development. Many schools report using funding to build staff expertise, leading to improved confidence in supporting complex needs, greater consistency of approach across staff teams and increased use of structured and evidence-informed strategies.

In some cases, schools report developing internal expertise that benefits not only individual CYP, but wider cohorts within the school. So that autism-informed practice and trauma-informed and relational approaches have become the new normal.

Indeed, a notable feature of effective practice reported by schools is the wider impact beyond individual CYP supported by exceptional funding. Many schools report that well-implemented provision improved the overall learning environment, reduced disruption and increased stability, benefitting other CYP with additional needs and, indeed, whole-school inclusion aims.

In schools where provision was developed more strategically, the funding acted as a lever for broader school improvement, rather than a resource for individual pupils.

Timely and Targeted Support

Many schools report positive outcomes where evidence-based interventions have been carefully selected, delivered consistently and integrated into a broader provision model. Effective examples cited in responses include structured literacy and numeracy interventions, precision teaching approaches, communication-focused programmes and social and emotional learning interventions. Crucially, these interventions are most effective where they are embedded within daily practice, rather than delivered as isolated activities.

Positive outcomes are also associated with schools that have effectively utilised external services and multi-agency support, including Educational Psychology, Specialist Teachers, Speech and Language Therapy and Occupational Therapy.

Where external support has been timely, consistent and aligned with school provision, it has contributed to clearer understanding of CYP needs, more targeted and appropriate interventions and increased staff confidence in implementation. Understandably, where a collaborative approach has been taken, the overall quality of provision and the ability of schools to support CYP has been strengthened.

“Effective use of the funding has enabled targeted interventions... improved progress, confidence, independence, and wellbeing.”

Gayle Edwards, Deputy Head,
Shaftesbury CE Primary

Effective Leadership

The most effective examples of practice revealed by respondents have been underpinned by strong leadership and strategic planning. In these cases, schools have taken a coherent, whole-school approach to inclusion, aligned funding use with a clear vision for SEND provision, moved from reactive responses to proactive system design and ensured consistency across staff and provision. This suggests that the impact of Mainstream Specialist exceptional funding is not determined solely by the amount of resource available, but also by how strategically it is used.

Challenges and Limitations

While Mainstream Specialist exceptional funding has provided important and often effective support for CYP with complex needs, the review identifies several consistent challenges and limitations that affect its use and impact.

These challenges are systemic rather than isolated, and reported across schools, phases and localities. They relate not only to how funding is implemented, but to the wider context in which schools are operating, including workforce capacity, infrastructure, and SEND sufficiency. Together, they highlight the limits of a predominantly reactive, individualised funding model in responding to increasing levels and complexity of need.

“While this bespoke provision supported short-term emotional safety... it did not result in sustained access to learning... reinforcing the need for timely access to specialist provision.”

Gary Spracklen, Headteacher,
The Prince of Wales

Workforce

The most frequently reported challenge relates to the recruitment and retention of suitably skilled staff. Schools report difficulty recruiting teaching assistants and HLTAs, limited availability of staff with specialist SEND expertise, reliance on agency or temporary staff and challenges maintaining consistency of staffing for CYP.

These issues directly impact the effectiveness of provision. Where staffing is unstable or insufficiently skilled, consistency of support is reduced, relationships (which are critical to many CYP) are disrupted, and interventions are more difficult to implement. In some cases, schools report that senior leaders, SENDCOs or teaching staff are required to provide direct support due to staffing shortages, placing additional pressure on wider school capacity.

“Recruitment is difficult... you do not get skilled people apply for temporary roles.”

Juliette Frampton, Assistant Principal & SENCo,
Atlantic Academy



“Sometimes difficult to cope with volume of different needs and not enough skilled staff.”

Kirsty Rogers,
SENDCo, Wyke Regis Primary Federation

Physical Space and Environment

A second major challenge is the availability of appropriate physical space within mainstream schools. Many schools report that they do not have sufficient rooms to create dedicated provision spaces and have to repurpose unsuitable areas, including corridors, shared spaces and offices. Consequently, in many of these cases, schools cannot provide low-arousal environments consistently and had difficulty separating groups of CYP with incompatible needs.

This has significant implications for the quality of provision. For many CYP in this cohort, environment is as important as staffing, particularly in relation to sensory regulation, communication and emotional wellbeing. Where appropriate space is not available, schools are limited in their ability to move beyond reactive, adult support, and may be unable to implement more effective small-group or structured provision models.

Suitability of Mainstream Environments

Schools consistently report that, for some CYP, the mainstream classroom environment remains inherently challenging, even with significant adaptation.

Frequent issues include sensory overload due to noise, movement and class size, pace and structure of the mainstream curriculum, social demands of large group settings and limited opportunities for individualisation within whole-class teaching.

As a result, many CYP spend a significant proportion of their time outside the classroom so access to mainstream learning may be highly restricted or supported. This raises important questions about the appropriateness of placement over time, particularly for CYP who require consistently low-arousal, highly structured environments.

“My concern is that this is a place holder and a way of keeping children in a provision which is ultimately not suitable for them.”

Mick Homer, Headteacher,
Mary's CE First School

St



Funding Sufficiency and Timeliness

Aside from issues around provision, a significant minority of schools also identify challenges relating to the level and administration of funding. These schools report that funding does not fully cover the cost of required provision, that delays in funding allocation or confirmation lead to difficulties creating suitable provision and that the model is reactive and inherently uncertain, given that CYP could move on to a specialist placement at any time. In some cases, schools report that they have front-funded provision to meet immediate need, creating financial risk and pressure.

These factors affect schools' ability to recruit and retain staff on a stable basis, invest in longer-term provision models and plan provision strategically, rather than reactively.

“In a larger school with a higher number and complexity of needs, funding... is insufficient to meet the cumulative demand for specialist expertise, intervention time, resources, and leadership oversight required.”

Gayle Edwards, Deputy Head of School,
Shaftesbury CE Primary School

Reliance on Individualised Support Models

The review highlights a strong reliance on 1:1 staffing models, often driven by immediate need and risk management. While effective in the short term, this approach presents several well-understood limitations:

- ▶ It can reduce opportunities for independence and peer interaction
- ▶ It is difficult to sustain financially and operationally
- ▶ It may be vulnerable to staffing changes or absence
- ▶ It does not address underlying structural gaps in provision

Many schools indicate that small-group or structured provision models are more effective than providing 1:1 TA support. However, for many this option is not achievable within the funding envelope.

Access to Alternative and Specialist Provision

Limited access to suitable alternative provision (AP) and specialist placements has also identified as a challenge. Schools report a shortage of appropriate AP placements, variability in the quality and suitability of AP, costs exceeding available funding and delays in securing specialist placements.

As a result, some CYP remain in mainstream settings for extended periods while awaiting alternative provision, requiring schools to provide intensive and sustained support beyond what might reasonably be expected.

“The funding has been used mostly for alternative provision... however the costs are very high and the funding does not cover these costs.”

Emma Sleightholme, Headteacher,
Winterbourne Valley First

Complexity of SEND

The increasing complexity and co-occurrence of needs presents an ongoing challenge. Schools describe supporting CYP with multiple and interacting areas of need, significant developmental delay, high levels of emotional and behavioural dysregulation and limited access to mainstream teaching without adaptation. In these cases, even well-planned provision may be insufficient to fully meet need, and progress may be slow, uneven and focused on stabilisation rather than academic attainment.

This reflects the reality that some CYP supported through the Mainstream Specialist exceptional funding route have needs that extend beyond the capacity of mainstream settings, even when additional funding is available.

Variability and Equity

The review also identified variation in experience between schools, influenced by differences in staffing and expertise, availability of physical space, access to external support and – most critically of all – leadership capacity and strategic approach.

This variation raises issues of equity, as the quality and effectiveness of provision can depend on local circumstances – and particularly the commitment of individual school leaders to truly inclusive practice – rather than need alone.

Many schools that report successful integration of CYP with complex SEND via the Mainstream Specialist exceptional funding route express concern that highly inclusive schools may be disproportionately impacted, that access to resources and support is not always consistent and that the system relies heavily on individual school capacity and goodwill. A small minority of schools used the funding to place CYP somewhere else (such as in independent AP) rather than trying to include them.



Strategic Implications

While the funding is enabling schools to support CYP with complex needs and preventing placement breakdown in many cases, it is also clear that the current approach is not sustainable as a primary mechanism for meeting specialist-level need within mainstream education. Evidence clearly points towards the need for a more planned, structured and differentiated system of provision, aligned with both local priorities and national policy direction.

From Individualised Responses to Planned Provision

A key implication of the review is that the system has become increasingly reliant on case-by-case funding decisions to address need that are, in many instances, predictable and recurring.

The survey clearly indicates that schools are frequently:

- ▶ Recreating similar forms of provision independently
- ▶ Developing bespoke arrangements for individual CYP
- ▶ Relying heavily on 1:1 staffing to manage need

While effective in the short term, this approach leads to inconsistency in provision, creates inefficiencies in the use of resources, places significant pressure on school staffing and leadership and makes long-term planning difficult.

The findings suggest a need to move towards planned specialist-in-mainstream provision, where common patterns of need are met through structured, collectively resourced models, rather than individualised responses alone. This aligns with the SEND and Alternative

Provision Improvement Plan (*Every Child Achieving and Thriving*, DfE 2026), which emphasises the importance of consistent, system-wide approaches and the reduction of reliance on ad hoc, reactive arrangements.

“Money is not the only answer... we need specialists involved... a funding model that follows the child does not allow schools to plan long term.”

Adam Darley, Headteacher,
The Purbeck School

Clarifying the Role of Mainstream Education

While mainstream schools have demonstrated significant commitment and adaptability, the evidence suggests that not all needs can be met effectively within a standard mainstream classroom environment.

Some CYP require sustained access to low-arousal, highly structured provision. The expectation that individual schools can adapt fully to all levels of need is not realistic.

National policy reinforces this position. The DfE is clear that mainstream inclusion must be supported by appropriate infrastructure, expertise and resource, and that specialist provision remains an essential part of the system for CYP whose needs cannot reasonably be met in mainstream settings.

This review therefore supports a model in which mainstream schools:

- ▶ Continue to play a central role in inclusion
- ▶ Are supported by clearly defined specialist pathways and provision including an Experts at Hand offer, to be developed in response to the SEND Reforms
- ▶ Are only asked to support CYP with specialist needs who can be educated locally, with reasonable adaptations to ordinarily available provision

The Importance of Environment

A consistent theme throughout the findings is that environmental factors are as important as staffing in meeting the needs of CYP with complex SEND. The widespread use of bespoke provision spaces, small-group teaching environments and low-arousal and sensory-adapted settings demonstrates that effective support is not simply a function of additional adults, but of how provision is designed and delivered.

It is clear therefore that investment in staffing alone will not be sufficient. Schools require access to appropriate physical environments. Planning for SEND provision must include space and infrastructure considerations. This aligns with national expectations that inclusion requires adaptation of environments and systems, not only increased staffing levels.

“Basing the model on TA/HLTA costs assumes staffing is the solution... the issue is often the suitability of the environment itself.”

Gary Spracklen,
Headteacher, The Prince of Wales

Sustainability and Workforce Considerations

The heavy reliance on additional staffing, particularly 1:1 support, raises important questions about sustainability. The current model depends on a workforce that is already under pressure, is vulnerable to recruitment and retention challenges, requires ongoing, high levels of funding for individual CYP and may not promote independence or longterm outcomes.

The DfE highlights the importance of developing a skilled and confident workforce, supported by clear expectations and consistent training. However, this must be combined with a shift towards models of provision that are less dependent on individual staffing ratios and more focused on structured, specialist practice.

System Equity and Consistency

The variation in how the Mainstream Specialist exceptional funding is used across schools raises important issues of equity and consistency. At present, the quality and type of provision available to CYP may depend on the capacity of individual schools. Access to enhanced support can vary between localities, with highly inclusive schools experiencing disproportionate pressure. Highly inclusive schools may experience disproportionate pressure. Access to enhanced support can vary between localities.

A more planned approach to provision would support greater consistency in the offer available to CYP, more equitable distribution of resources and clearer expectations for schools and families. This reflects the national ambition, set out in *Every Child Achieving and Thriving* (DfE, 2026), to ensure that every child can expect a consistent and high-quality SEND experience, regardless of where they live.

Reducing Reliance on Exceptional Funding

The findings from the survey suggest that, while Mainstream Specialist exceptional funding will continue to play an important role, the system should aim to reduce reliance on it over time as a primary means of meeting need.

This is not because the funding is ineffective, but because it is resource-intensive. It can reinforce reactive approaches and it does not provide a consistent, systemwide offer. Instead, exceptional funding should sit within a broader system where baseline provision is strengthened, specialist-in-mainstream options are clearly defined and pathways between mainstream, specialist and alternative provision are transparent.

This aligns with national policy, which promotes a graduated, coherent system of support, rather than reliance on exceptional measures.

Alignment with National Reform

The findings of this review are closely aligned with the direction set out in *Every Child Achieving and Thriving* (DfE, 2026), particularly in relation to:

- ▶ Strengthening mainstream inclusion through better support and clearer expectations
- ▶ Developing planned local provision systems, rather than reactive responses
- ▶ Improving consistency and equity across local areas
- ▶ Ensuring that specialist provision is used appropriately and effectively
- ▶ Reducing reliance on crisis-driven and unplanned arrangements

In this sense, the experiences of schools in Dorset reflect wider national challenges and reinforce the relevance of the proposed reforms.

In summary, this review suggests that:

- ▶ Mainstream Specialist exceptional funding is valuable but not sufficient as a long-term solution
- ▶ There is a need to move from individualised, reactive responses to planned, structured provision models
- ▶ Mainstream schools require greater support, clarity and infrastructure to meet complex need
- ▶ Effective provision depends on environment and design, not just staffing
- ▶ Future sufficiency development should align with national policy by creating a more coherent, consistent and sustainable SEND system

Recommendations

The following recommendations set out a strategic direction of travel for Dorset, recognising the need to:

- ▶ **Theme 1:** Strengthen Mainstream Inclusion Capacity
- ▶ **Theme 2:** Reduce Reliance on Exceptional Funding
- ▶ **Theme 3:** Develop a Planned and Coherent SEND System, aligning local practice with national ambitions outlined in *Every Child Achieving and Thriving* (DfE, 2026)
- ▶ **Theme 4:** Ensure Consistent Funding Across the System

Strengthen Mainstream Inclusion Capacity

Recommendation 1: Continue to support and develop inclusive practice in mainstream schools through clear expectations, guidance and training

This should include:

- ▶ Strengthening the implementation of ordinarily available provision
- ▶ Promoting evidence-based approaches to teaching and intervention
- ▶ Supporting schools to prioritise regulation, wellbeing and readiness to learn
- ▶ Ensuring consistent approaches to SEND across schools

This aligns with the national expectation that mainstream schools play a central role in inclusion, supported by appropriate training and system-level clarity.

Recommendation 2: Increase access to high-quality training and professional development for the SEND workforce, not only through an Experts at Hand model but through improved local outreach offer

Priority areas should include:

- ▶ Communication and interaction (including autism practice)
- ▶ Cognition and learning strategies
- ▶ Trauma-informed and relational approaches
- ▶ Behaviour and regulation
- ▶ Adaptive teaching and curriculum design

This will support the development of a skilled, confident workforce, reducing reliance on adhoc solutions and strengthening consistency of practice.



Reduce Reliance on Exceptional Funding

Recommendation 3: Reposition Mainstream Specialist exceptional funding as part of a broader, graduated system of support rather than a primary mechanism for meeting need

This should involve:

- ▶ Clearer criteria and thresholds for accessing funding
- ▶ Improved timeliness and predictability of decision-making
- ▶ Alignment with planned provision pathways
- ▶ Regular review of cases to support appropriate transitions

The aim is not to reduce the availability of funding, but to ensure that it is used strategically and proportionately, within a clearer system framework.



Develop a Planned and Coherent SEND System

Recommendation 4: Develop a network of Inclusion Bases across Dorset, aligned to the patterns of need identified in the review

This should include:

Cognition and Learning (C&L) Inclusion Bases

- ▶ Establish C&L inclusion bases across all localities
- ▶ Provide structured, cumulative teaching and adapted curricula
- ▶ Support CYP who require significant adaptation but can benefit from mainstream inclusion

Evidence from the review indicates that many CYP currently supported through exceptional funding fall within this group, and that schools are already attempting to replicate this model on an individual basis.

Communication and Interaction (C&I) Inclusion Bases

- ▶ Expand existing provision to increase capacity and locality coverage
- ▶ Provide lowarousal environments and specialist communication support
- ▶ Support CYP with autism and related needs who cannot access mainstream classrooms consistently

SEMH Inclusion Bases and Alternative Provision (Learning Centres)

- ▶ Ensure specialist support is available in every locality and at every phase to support CYP with Social, Emotional and Mental Health needs who need access to therapeutic, relational and low-demand environments to stabilise and re-integrate into a mainstream environment
- ▶ Support schools to adapt their environments and approaches to better manage CYP at risk of exclusion, through an improved and clearly defined AP offer (including outreach)

Taken together, these developments will reduce reliance on 1:1 staffing models, provide more consistent and equitable access to specialist support, enable earlier and more appropriate intervention and relieve pressure on special schools and alternative provision.

This aligns strongly with the national direction towards planned, locally accessible specialist-in-mainstream provision.

Recommendation 5: Support investment in physical infrastructure to deliver inclusive provision

This should include:

- ▶ Support for schools to make cost-effective adaptations to existing environments to create – for example – small-group and low-arousal (sensory) spaces
- ▶ Support for schools to adapt existing buildings where feasible

Recommendation 6: Strengthen pathways between mainstream, specialist provision and Alternative Provision to ensure CYP receive the right support at the right time

This should involve:

- ▶ Clearer criteria for placement decisions
- ▶ Improved coordination between services
- ▶ Reduced delays in accessing appropriate provision
- ▶ Stronger links between mainstream schools and specialist providers

The aim is to create a system where movement between settings is planned and purposeful, rather than reactive.



Recommendation 7: Use the development of Inclusion Bases to release capacity within specialist provision for CYP with the most complex needs

By enabling some CYP to be supported effectively within specialist-in-mainstream provision, capacity can be created within special schools, resources can be targeted more effectively, and overall system balance can be improved.

This reflects the principle that specialist provision should be used where it is most needed, as set out in national policy.

Ensure Consistent Funding Across the System

Recommendation 8: Review the funding model to ensure it supports the development of a more planned and sustainable system

Efforts should be made to ensure funding levels reflect the true cost of provision, that allocation of funding is consistent and transparent and that reactive, short-term solutions are not incentivised. This will help ensure that resources are used in a way that supports systemlevel improvement, rather than solely individual cases.



Conclusion

This review has demonstrated that Mainstream Specialist exceptional funding is a valuable and impactful component of Dorset's SEND system, enabling schools to support children and young people (CYP) with complex needs who might otherwise be unable to access education within mainstream settings.

The evidence shows that the funding has made a meaningful difference to CYP, schools and communities. It has supported inclusion, improved stability, reduced the risk of exclusion, and enabled schools to respond flexibly and creatively to a wide range of needs.

However, the review also highlights that the funding is operating within a system experiencing significant pressure, and that its current use is often shaped by the need to respond to immediate challenges rather than longterm planning.



Key Messages

Several consistent messages emerge from the findings:

- ▶ Mainstream schools are increasingly supporting CYP with specialist-level needs, often requiring significant adaptation to provision, environment and staffing
- ▶ Mainstream Specialist exceptional funding is effective in stabilising placements and supporting engagement, but does not always enable needs to be fully met over time
- ▶ Schools are developing innovative and effective practice, particularly where they can create structured, smallgroup and specialist provision
- ▶ There are systemic challenges relating to workforce, space, funding and access to specialist provision that limit what can be achieved
- ▶ The current model relies heavily on individualised, reactive responses, which creates variability and challenges for sustainability

Future Direction

The review supports a clear direction of travel towards a more planned, coherent and sustainable SEND system, in line with national policy expectations set out in *Every Child Achieving and Thriving* (DfE, 2026). This includes:

- ▶ Strengthening the role of mainstream schools through improved support, training and clarity
- ▶ Reducing reliance on exceptional, case-by-case funding as a primary mechanism
- ▶ Developing specialist-in-mainstream provision that reflects common patterns of need
- ▶ Improving pathways between mainstream, specialist and alternative provision
- ▶ Ensuring that CYP with the most complex needs can access appropriate specialist settings where required

In this context, Mainstream Specialist exceptional funding remains an important tool, but its role should evolve as part of a wider system that is more proactive, equitable and strategically aligned.

Final Reflections

This review reflects the commitment, adaptability and professionalism of Dorset's mainstream schools in supporting CYP with increasingly complex needs. The overwhelming majority of schools have demonstrated a willingness to innovate and to prioritise inclusion.

The next phase of system development provides an opportunity to build on this strong foundation by creating a more consistent and sustainable framework of support, to ensure that CYP receive the right provision, in the right place, at the right time. Schools are equipped with the resources, environments and expertise they need and the system as a whole can respond effectively to both current and future demand.

By aligning the strengths of current practice with a more structured and planned approach, Dorset is well-placed to continue developing a SEND system that is sustainable, responsive and inclusive.



Appendices

Appendix A

Financial Overview of Mainstream Specialist Funding

Overview of Investment

Mainstream Specialist exceptional funding represents a significant and growing area of SEND investment within Dorset. Between Autumn 2024 and Spring 2026, a total of approximately £7.6 million was allocated to mainstream schools to support children and young people (CYP) with specialist-level needs through the Mainstream Specialist Exceptional Funding route.

	Autumn 2024	Spring 2025	Summer 2025	Autumn 2025	Spring 2026	Total
SEND Chesil	£ 369,096	£ 386,301	£ 477,946	£ 407,216	£ 385,120	£ 2,025,680
SEND Dorchester & West	£ 194,852	£ 225,962	£ 341,425	£ 420,747	£ 341,080	£ 1,524,067
SEND East & Purbeck	£ 434,170	£ 342,978	£ 478,619	£ 499,259	£ 461,429	£ 2,216,456
SEND North	£ 219,348	£ 225,876	£ 424,991	£ 515,195	£ 442,005	£ 1,827,414
TOTAL	£ 1,217,467	£ 1,181,117	£ 1,722,981	£ 1,842,418	£ 1,629,634	£ 7,593,617

Table 1: Total mainstream specialist funding paid in each locality per term

This level of investment reflects both the increasing scale of demand and the intensity of provision required to sustain placements in mainstream settings.

Growth in Demand and Associated Costs

The financial investment closely mirrors a rapid increase in the number of CYP supported. The number of CYP increased from 141 (Autumn 2024) to 296 (Spring 2026), representing a 110% rise. This growth has been particularly pronounced in Key Stage 1, which increased by 127% (49 to 111 pupils). This expansion has driven a corresponding increase in funding allocations, with termly spend rising to a peak of £1.84 million in Autumn 2025, before slightly reducing to £1.63 million in Spring 2026, reflecting the shorter length of the Spring term rather than a reduction in demand.

	Autumn 2024	Spring 2025	Summer 2025	Autumn 2025	Spring 2026	Growth
KS1	49	64	69	109	111	127%
KS2	52	69	53	110	114	119%
KS3	28	31	19	61	46	64%
KS4	12	11	10	27	25	108%
TOTAL	141	175	151	307	296	110%

Table 2: The number of young people in receipt of mainstream specialist funding per term by key stage.

Distribution of Funding by Locality

Funding is distributed across Dorset's four SEND localities, with notable variation:

- SEND East & Purbeck: £2.22m
- SEND Chesil: £2.03m
- SEND North: £1.83m
- SEND Dorchester & West: £1.52m

East & Purbeck and Chesil account for the largest share of spend, reflecting higher demand, higher complexity and differences in local provision capacity. This variation in spend aligns with themes identified elsewhere in the report regarding uneven pressures and capacity across the system.

	Autumn 2024	Spring 2025	Summer 2025	Autumn 2025	Spring 2026	Total
Chesil						
Primary	£ 233,694	£ 260,430	£ 383,955	£ 309,663	£ 289,823	£ 1,477,566
Secondary	£ 135,403	£ 125,871	£ 93,991	£ 97,553	£ 95,297	£ 548,114
Dorchester & West						
Primary	£ 137,043	£ 159,205	£ 225,274	£ 280,319	£ 243,674	£ 1,045,514
Secondary	£ 57,809	£ 66,757	£ 116,151	£ 140,428	£ 97,407	£ 478,552
East & Purbeck						
Primary	£ 350,144	£ 283,901	£ 409,452	£ 359,682	£ 334,881	£ 1,738,062
Secondary	£ 84,026	£ 59,077	£ 69,167	£ 139,577	£ 126,547	£ 478,394
North						
Primary	£ 207,027	£ 209,447	£ 383,092	£ 436,675	£ 389,471	£ 1,625,711
Secondary	£ 12,321	£ 16,429	£ 41,898	£ 78,520	£ 52,534	£ 201,703

Table 3: Total mainstream specialist funding paid in each locality per term by school phase

Funding by Phase and Key Stage

Analysis shows that funding is heavily concentrated in the primary phase and earlier key stages. The largest numbers of CYP are in KS1 (111 pupils) and KS2 (114 pupils). Many CYP move from mainstream to specialist provision (Special School or Independent Non-Maintained Special School) at the point of transition from primary to secondary phase, reflecting survey responses which indicate that primary schools are more able to adapt their provision to meet the needs of CYP with SEND.

During the time the Mainstream Specialist exceptional funding model has been in place, growth rates by key stage clearly indicate that primary-phase spend significantly outweighs secondary, with primary provision representing the largest share of investment.

This data reinforces a key systemic insight: that increasing need is emerging earlier, perhaps through more effective early identification, placing pressure on primary schools to deliver specialist-level provision much earlier than before.

	Autumn 2024	Spring 2025	Summer 2025	Autumn 2025	Spring 2026	Total
Chesil						
KS1	£ 122,818	£ 145,454	£ 202,973	£ 176,828	£ 152,317	£ 800,390
KS2	£ 110,875	£ 114,977	£ 180,982	£ 132,835	£ 137,506	£ 677,176
KS3	£ 83,806	£ 81,646	£ 45,054	£ 37,058	£ 42,760	£ 290,324
KS4	£ 51,596	£ 44,225	£ 48,937	£ 60,495	£ 52,537	£ 257,790
Dorchester & West						
KS1	£ 58,592	£ 64,700	£ 97,259	£ 95,177	£ 73,301	£ 389,028
KS2	£ 78,452	£ 94,505	£ 128,015	£ 185,142	£ 170,373	£ 656,486
KS3	£ 48,226	£ 63,334	£ 97,417	£ 82,377	£ 67,679	£ 359,033
KS4	£ 9,583	£ 3,423	£ 18,734	£ 58,051	£ 29,728	£ 119,520
East & Purbeck						
KS1	£ 141,483	£ 117,207	£ 188,818	£ 188,434	£ 175,293	£ 811,234
KS2	£ 208,661	£ 166,695	£ 220,635	£ 171,248	£ 159,589	£ 926,827
KS3	£ 51,596	£ 36,964	£ 43,951	£ 101,334	£ 92,339	£ 326,184
KS4	£ 32,430	£ 22,113	£ 25,216	£ 38,243	£ 34,209	£ 152,210
North						
KS1	£ 110,252	£ 113,094	£ 219,719	£ 264,827	£ 226,952	£ 934,843
KS2	£ 96,775	£ 96,353	£ 163,373	£ 171,848	£ 162,519	£ 690,869
KS3	£ 9,583	£ 8,214	£ 20,172	£ 41,094	£ 31,767	£ 110,832
KS4	£ 2,738	£ 8,214	£ 21,726	£ 37,426	£ 20,767	£ 90,871
TOTAL	£ 1,217,467	£ 1,181,117	£ 1,722,981	£ 1,842,418	£ 1,629,634	£ 7,593,617

Table 4: Total mainstream specialist funding paid in each locality per term by key stage

Cost Drivers and Funding Characteristics

An analysis of detailed school-level data shows funding is typically standardised per pupil but varies based on term length (e.g. 11–14 weeks) and the level of need and provision required. Individual placements can range from £9k per term to over £100k annually in the most complex cases, when additional sources of funding are included.

Spend is concentrated in a relatively small number of schools, often those with strong inclusive practice or capacity to deliver bespoke provision, supporting the report's wider finding that the system is relying on highly inclusive schools and individualised funding arrangements rather than planned, equitable provision.

Key Financial Insights

Bringing the data together, several clear messages emerge:

- ▶ Funding has grown significantly in response to demand, rather than through planned system design
- ▶ Investment is closely tied to pupil numbers, indicating a reactive funding model
- ▶ There is significant variation by locality, suggesting differences in demand, access, or practice
- ▶ Spend is concentrated in:
 - ▶ Early years / primary phases
 - ▶ A subset of schools
- ▶ High-cost individual packages highlight the limitations of relying on 1:1 or bespoke provision models

Implications for Sustainability

The financial data strongly reinforces the strategic conclusions of this report, namely:

- ▶ The current model is resource-intensive and difficult to sustain at scale
- ▶ Continued growth at this rate would place significant pressure on the High Needs Block
- ▶ There is a clear need to shift from reactive, individual funding toward planned, locality-based specialist provision

Appendix B

Survey Responses (Overview)

In the first quarter of 2026, a survey was conducted to gather insights from schools on how exceptional top-up funding for children and young people with SEND was being utilised in practice. It aimed to understand the types of provision being implemented, the impact of funding on pupils and wider school communities, and the challenges and opportunities experienced by schools. The findings from the survey informed the report within which this appendix sits, which in turn has provided recommendations on the future development of funding and provision arrangements to support a more effective, needs-led approach to inclusion in mainstream settings.

1. Profile of Respondents

Responses were predominantly from senior leaders, with 49% Headteachers and additional representation from SENDCos and Inclusion Leads. The sample includes a broad cross-section of schools, with representation from secondary and primary phases, maintained and academy settings and all Dorset localities.

2. Scale of Need

Most schools are supporting multiple funded pupils, with 60% supporting 1–2 pupils, leaving a notable proportion (40%) supporting 3+ pupils, indicating growing demand and cumulative pressure within settings.

3. Use of Funding

The funding is overwhelmingly used for staffing capacity. 51% primarily used funding to employ 1:1 staff (TAs/HLTAs), whilst 40% used it primarily to create bespoke provision. Minimal use was reported for training or specialist resources as a primary strategy, suggesting immediate need is workforce-based.

Schools demonstrate layered use of funding, with strong emphasis on Interventions/programmes (41 responses), Training (33 responses) and Specialist resources (33

responses). This suggests schools blend staffing with wider provision development once basic support is secured.

4. Nature of Provision

Qualitative responses indicate provision is typically highly personalised, combining 1:1 support, small groups, and adapted environments, frequently includes sensory approaches, Forest School and external provision (including AP).

5. Inclusion Model in Practice

Where bespoke provision exists, 54% of CYP spend more time in provision than in mainstream with only 17% experiencing full mainstream predominance. This indicates a blended or partial inclusion model, rather than full mainstream integration.

6. Workforce Impact

Funding is used predominantly for Teaching Assistants (63 responses), with limited recruitment of teachers (8) or HLTA roles (11). This reflects reliance on TA-led delivery models, raising questions about sustainability and expertise levels.

7. Impact on Pupils (Direct Beneficiaries)

Strong positive impact reported in terms of improved access to education, increased stability and school retention, better engagement, communication, and regulation.

In several cases, funding has prevented placement breakdown while awaiting specialist provision.

8. Wider School Impact

Benefits extend beyond individual pupils with whole-class learning environments improved (reduced disruption), staff skills and confidence increased and resources and expertise shared across the school. 66 respondents identified the funded pupil as a beneficiary, but large numbers also identify staff, peers, and wider SEND cohorts.

9. System Enablers

Most frequently used external supports include TADSS Outreach (56), EEF guidance (52), Educational Psychologists & Specialist Teachers (45 each). This highlights reliance on external expertise to underpin in-school provision.

10. Key Challenges

The most cited challenges include delays and uncertainty in funding, insufficient levels of funding for complex needs and difficulty accessing specialist expertise or provision.

11. Confidence in Delivery

Most respondents feel confident to deliver provision, with 60% “mostly confident” and 13% “fully confident”. Confidence is limited by complexity of need and the gap between mainstream capability and specialist provision.

12. Views on the Funding Model

Views on current model are mixed. In response to the question, ‘Do you feel the funding model is appropriate for supporting children with special needs in mainstream settings?’ 35% felt that it was appropriate, 25% felt that it wasn’t and 40% were unsure. There was support for reform, with 40% feeling a needs-led and banded model would be preferable to the current system, with 18% opposed.

Appendix C

Sources

Alongside responses from the Mainstream Specialist survey, the following documents, datasets and evidence sources have informed the analysis, findings and strategic interpretation within this report.

1. National Policy, Research and Guidance

- ▶ Department for Education (2026)
Every Child Achieving and Thriving: SEND and Alternative Provision Improvement Plan.
- ▶ Department for Education (2015; updated 2025)
Special Educational Needs and Disability Code of Practice: 0 to 25 years.
- ▶ Education Endowment Foundation (2015)
Making Best Use of Teaching Assistants.
- ▶ Education Endowment Foundation (2025)
Deployment of Teaching Assistants: Guidance Report.
- ▶ Education Endowment Foundation (2020)
Special Educational Needs in Mainstream Schools.

2. Inspection and External Validation

- ▶ Ofsted and Care Quality Commission (2024)
Dorset Area SEND Inspection.
- ▶ Ofsted (2025)
Inspection of Local Authority Children's Services (ILACS): Dorset.

3. Dorset Strategic Plans and Partnership Frameworks

- ▶ Dorset Council (2026)
Best Start in Life Local Plan 2026–2029.
- ▶ Dorset Council (2025)
Strategic Governance Framework.
- ▶ Dorset Council (2023)
Children, Young People and Families Plan (2023-2033).

4. Commissioning, Sufficiency and System Planning

- ▶ Dorset Council (2023)
Principles of How We Commission in Dorset.
- ▶ Dorset Council (2024)
SEND Sufficiency and Capital Planning (including Capital Strategy 2024–2028).
- ▶ Dorset Council (2026)
Mainstream Specialist Exceptional Funding dataset.
- ▶ Dorset Council (2026)
Survey of Schools Using Mainstream Specialist Funding.

Appendix D

Schools and Settings

We would like to extend our sincere thanks to all schools and colleagues across Dorset who contributed to this survey. In total, 77 schools responded to the survey. Your openness, professionalism, and willingness to share both challenges and successes have been invaluable in shaping this report. The insights provided reflect a rich and honest picture of practice across the county, and your contributions will play a vital role in informing future development, improving provision, and strengthening outcomes for children and young people with SEND.

All Saints, Weymouth	Rushcombe First School
Archbishop Wake CE Primary School	Salway Ash CE VA Primary School
Atlantic Academy, Portland	Sandford St Martin's CE VA Primary
Beaminster School	Shaftesbury Abbey CE Primary School
Bincombe Valley Primary	Shaftesbury CE Primary School
Bovington Academy	Sherborne Abbey CE Primary School
Bridport Primary School	Sherborne Primary School
Broadmayne First School	St Andrew's Primary, Fontmell Magna
Broadwindsor CE VC Primary	St Catherine's Catholic Primary School
Cerne Abbas CE VC First School	St George's Primary School, Portland
Cheselbourne Village School	St Ives Primary and Nursery School
Conifers Primary School	St James' First School and Nursery
Corfe Castle CE Primary School	St John's CE Primary
Damers First School	St Mark's CE Primary School
Dorchester Middle School	St Mary & St Joseph's Catholic Primary
Dorset Studio School	St Mary the Virgin CE Primary School
Downlands Community Primary School	St Mary's Catholic Primary School
Emmanuel Middle	St Mary's CE First School, Charminster
Ferndown First School	St Mary's CE Middle School
Ferndown Middle School	St Mary's First School and Nursery (WM)
Henbury View First School	St Michael's CE Middle School
Hillside Primary	St Nicholas and St Laurence CE Primary
Initio Learning Trust (Small Schools)	St Nicholas CE Primary School (C Okeford)
Lulworth and Winfrith Primary School	St Osmund's CE Middle School
Lytchett Matravers Primary	Stalbridge Primary
Lytchett Minster School	Stoborough CE Primary School
Manor Park First School	Stower Provost Community School
Motcombe CE Primary	Sturminster Marshall First School
Parley First School	The Blandford School
Piddle Valley CE First School	The Gryphon School
Puddletown First School	The Prince of Wales School
Queen Elizabeth School	The Purbeck School
Radipole Primary School	The Thomas Hardy School

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