



SCHOOLS' FORUM

MINUTES OF MEETING HELD ON FRIDAY 25 SEPTEMBER 2026

50. Apologies, Minutes, Action Log & Correspondence Received

Apologies were received from Cllr Sutton and Cllr Bolwell. Barbara Southcott was expected to join later in the meeting. No correspondence was received.

Forum reviewed the outstanding actions from previous meetings. Members agreed that information relating to specialist placements in mainstream schools should become a regular item within the forward plan, supported by wider inclusion data where available. Officers were asked to identify an owner and timeline for the development of inclusion and Learning Centre data reports.

Actions relating to DSG expenditure breakdowns and independent placements were closed following confirmation that this information will be incorporated into future DSG monitoring reports once reporting from the new SEND system is available.

Actions relating to post-16 capacity, pupil growth and permanent exclusion reserves, DSG variances and special school capital capacity were closed, with members agreeing these matters had either been addressed or would be monitored through existing reports and updates.

The minutes of the meeting held on 3 July 2026 were approved as an accurate record

51. Declarations of Interest

None

52. Annual Review of the Maintained Schools' Scheme for Financing Schools

Forum received a report outlining proposed updates to the Scheme for Financing Schools following the annual review process and consultation with maintained schools.

Officers advised that the proposed amendments were largely technical in nature and reflected updated guidance and recommendations arising from internal audit work. Changes included the introduction of clearer requirements around the retention of financial records and updates to financial reporting arrangements for schools.

Members noted that 12 maintained schools had responded to the consultation and no objections to the proposed changes had been received. Whilst supportive of the amendments,

Members commented that the one-week consultation period was relatively short and requested that longer consultation periods be used where possible in future years. Officers acknowledged this point and advised that the compressed timetable was due to exceptional circumstances and would not be standard practice.

No further concerns were raised by Forum members.

Resolved: the maintained school representatives unanimously approve the proposed updates to the Scheme for Financing Schools

53. **Dedicated Schools' Grant (DSG) Outturn For 2026-27 Q1**

Forum received the Quarter 1 DSG monitoring report, which forecast an in-year High Needs Block overspend of £73.7 million and a cumulative DSG deficit of approximately £222 million by March 2027.

Officers advised that the position remained broadly in line with budget assumptions, with pressures continuing to be concentrated within the High Needs Block. Members were informed that Dorset's SEND Reform Plan had been submitted to the Department for Education and that a decision on the application, including the proposed write-off of 90% of the historic DSG deficit, was now expected later in the autumn following a national delay. Whilst approval would significantly reduce Dorset's historic deficit, officers noted that considerable uncertainty remains around the long-term funding arrangements for future High Needs deficits.

Members welcomed the update but expressed concern regarding the sustainability of the current High Needs funding system. Discussion focused on how proposed SEND reforms and the drive for greater inclusion within mainstream schools would address the scale of the financial pressures being experienced nationally and locally. Members noted that whilst supporting more children within local mainstream provision should reduce reliance on expensive independent specialist placements and associated transport costs, there remained limited information regarding how future funding reforms would operate in practice.

Forum discussed the continued growth in EHCP numbers, the cost of independent specialist placements and the associated home to school transport pressures. Members emphasised the importance of increasing local provision and supporting inclusion across mainstream schools, whilst recognising that schools would require appropriate funding and resources if they are to play a greater role in meeting need.

Officers confirmed that more detailed analysis of High Needs expenditure by placement type would return in future monitoring reports once reporting functionality from the new SEND management system is fully operational.

54. Allocation Of The Falling Rolls Fund

Forum considered proposals for the allocation of the £300,000 Falling Rolls Fund, which had been carried forward from the previous financial year. Officers outlined the proposed methodology, which sought to target funding towards schools experiencing the most significant and sustained declines in pupil numbers.

Whilst members broadly supported the proposed approach, discussion focused on the purpose of the fund and the financial impact of falling rolls. Members recognised that schools benefit from lagged funding arrangements but noted that reducing staffing structures in response to falling pupil numbers can be difficult, particularly where reductions do not align to whole class sizes. Questions were also raised about whether future allocations should take account of admission number reductions and the financial impact of partially filled year groups.

Members highlighted the importance of ensuring that schools experiencing long-term demographic change are supported to make sustainable decisions regarding their Published Admission Numbers (PAN), with officers confirming that these discussions were already taking place with individual schools where appropriate.

Forum also discussed wider strategic responses to falling rolls, including collaboration between the Council, trusts and diocesan partners. Members sought assurance that school organisation and leadership arrangements continue to be considered as part of longer-term planning for areas experiencing declining pupil numbers.

Overall, members considered the proposed methodology to be fair, transparent and data-led and supported the proposed allocation of the fund. It was noted that the current allocation relates to a one-off fund carried forward from a previous year and that a decision on whether to establish a Falling Rolls Fund for 2027/28 would be considered by Schools' Forum as part of the School Funding consultation and budget-setting process in January 2027.

55. Review of the Financial Efficiency Policy

Forum considered the proposed updates to the Financial Efficiency Policy, which had last been reviewed in 2022. Officers explained that the amendments were primarily intended to reflect audit recommendations, strengthen financial controls and promote consistent financial practice across maintained schools.

Members noted the introduction of updated requirements relating to financial processes, use of the local authority chart of accounts, integrated curriculum financial planning, management of surplus balances and the expectation that schools attend mandatory financial training where required.

During discussion, members sought clarification regarding the amended wording on the use of revenue funding for capital projects. It was noted that some schools, particularly voluntary aided schools, may have limited access to alternative capital funding streams and could therefore need to utilise revenue balances to maintain their buildings. Officers confirmed that the policy was not intended to prevent this but rather to ensure schools consider the potential impact on future financial sustainability and educational delivery before committing resources.

Members welcomed the emphasis on good financial governance and noted that a number of the amendments arose from recommendations made through recent audit activity within maintained schools.

56. School Improvement Service Impact Report

Forum received the annual School Improvement Service Impact Report outlining the work undertaken by Education Challenge Leads, Governor Services and the Schools Finance Team during 2025/26.

Members welcomed the report and noted the positive outcomes being achieved across a range of areas, including improvements in Key Stage 2, phonics, Early Years and GCSE outcomes. The Forum heard that support provided by Education Challenge Leads during Ofsted inspections had been particularly valuable, with members commenting positively on the quality of challenge, advice and practical support available to schools before and during inspections.

Members also discussed governor development and training. It was noted that attendance at governor training events had increased significantly, particularly in response to the revised Ofsted framework and the greater scrutiny being placed on governance arrangements during inspections. Officers confirmed that the training programme would continue to evolve in response to feedback from schools, governors and inspection outcomes.

Forum welcomed the continuation of collaborative improvement activity across Dorset, including peer review programmes, subject networks, leadership development and partnership working with trusts and other school improvement partners. Members also noted the successful bid to secure further funding for work focused on improving Key Stage 2 outcomes.

Forum noted the report and thanked officers for their work in supporting schools across the county.

57. Capital Funding for Maintained Schools Update

Forum received an update on capital investment in maintained schools and noted the significant level of investment being delivered through the strategic maintenance, modernising schools and SEND capital programmes.

Members welcomed the continued expansion of SEND capacity across Dorset, including the development of additional Inclusion Hubs and specialist provision. Officers highlighted the range of projects completed and in development, alongside the Council's wider commitment to increasing local provision and reducing reliance on out-of-county placements.

During discussion, concerns were raised regarding delays in communication and responsiveness from some property and maintenance teams. Members reported difficulties in obtaining updates on outstanding works and queried what action was being taken to improve service delivery. Officers acknowledged these concerns and advised that capacity issues within parts of the service had contributed to delays, but work was underway to address these issues and improve responsiveness.

Members also questioned the relatively low level of strategic maintenance expenditure compared with the level of School Condition Allocation funding received. Officers explained that capacity constraints and changes to contractor framework arrangements had affected delivery during the year, although the funding remained available and would continue to support future projects. Members sought assurance that maintenance expenditure would increase in future years to address condition issues across the maintained estate.

58. Distribution of the Inclusive Early Years Fund / DfE Early Years Funding consultation

Forum received an update on the allocation of the Inclusive Early Years Fund and Dorset's response to the Department for Education consultation on future Early Years funding arrangements.

Officers explained that Dorset had received £203,606 through the Inclusive Early Years Fund to support SEND inclusion within early years settings. Given the limited funding available, a methodology had been developed to provide meaningful allocations to settings based on participation levels, whilst recognising that it had not been possible to support every provider. Members noted that 176 settings had received funding.

Discussion focused on the challenges created by the limited value of the grant and the impact on smaller providers, particularly childminders. Members questioned whether additional support would be available for settings that had not received funding. Officers advised that the grant would continue next year and that Dorset had strongly advocated

through the consultation process for future funding to be distributed in a way that benefits all settings.

Members welcomed the principle of supporting inclusion at the earliest stage and noted the important role early years settings play in identifying and meeting need before children require statutory support. The Forum also discussed the wider consultation proposals, including changes to support for disadvantaged families and future SEND funding arrangements.

Concern was expressed regarding proposals to fund Ofsted registration fees through Early Years funding rates. It was felt that provider funding should remain focused on supporting children's learning and development rather than absorbing regulatory costs. This view was reflected in Dorset's consultation response.

Members noted that further discussion with the Early Years Reference Group would take place during the autumn term to help shape local funding arrangements for 2027/28.

59. **Any other business**

None

Enc: Attendance Log

Enc: Action Log

Minutes of Dorset Schools' Forum Meeting 25th September 2026

Attendance Record

			25 Sep	7 Nov	16 Jan	27 Feb	27 Mar	3 Jul
MEMBERS								
Secondary Maintained	Phil Jones (Chair)	Head Teacher - Ferndown Upper School	P					
	Keith Hales (Vice Chair)	Head Teacher - Beaminster School	P					
	Luana Girling	Governor - Lytchett Minster School	P					
Primary Maintained	Simon Smith	Head Teacher - Parrett & Axe Primary School	P					
	Barbara Southcott	Governor - Cerne Abbas First School	P					
	Adam Gough	Head Teacher - Bincombe Valley Primary School	P					
Special Maintained	Clive Padgett	Head Teacher - Yewstock School & College	P					
Learning Centre Maintained	David Dinsmore	Head Teacher - Dorchester Learning Centre	P					
	Alison Glazier	Head Teacher - Compass Learning Centre						
Secondary Academy	Brian Boyes	Director of Secondary Education – Initio Learning Trust	P					
	Nick Rutherford	Head Teacher - Thomas Hardy School, Wessex MAT	P					
	Vacancy							
	Vacancy							
Primary Academy	Paul Lavis	Interim Director of Education - SAST	P					
	Giles Pugh	Deputy Director of Education and Finance Director - Salisbury Diocesan Board of Education	P					
	Debbie Shutts	Chief Financial Officer - Wessex MAT	P					
	Mick Homer	Head Teacher - St Mary's First School, Charminster	P					
Special Academy	Katherine Seymour	Head Teacher - Wyvern Academy	P					
Learning Centre Academy	Kelly Knight	Head Teacher - Harbour Vale School, SAST	P					
Early years	Lorraine Clark	Proprietor - Hopscotch Pre-school	P					
	Dani Mark	Director - Muddy Monkeys Ltd						
	Alex Fulton	Little Birch Pre-School	P					
Post-16	Kate Wills	Principal - Coastland College	P					
Trade Unions	Sarah Randell	NASUWT - Dorset Teachers' & Support Staff Council						
NAMED OBSERVERS								
Maintained Learning Centres	Kieren Hasler	Governor - Forum Centre	P					
Maintained Special Schools	Bruce Bonwell	Governor- Westfield Arts College	P					
Local Authority	Clare Sutton	Portfolio Holder for Children's Services	A					
Church Schools	Giles Pugh	Deputy Director of Education and Finance Director - Salisbury Diocesan Board of Education	P					
Local Authority	Bridget Bolwell	Elected Member	A					
Local Authority	Carole Jones	Formal observer to the Schools Forum (Elected Member)						
OFFICERS								
Local Authority	Grace Benn	Education Finance Assistant	P					
Local Authority	Lisa Cullen	Senior Accountant (Children's)						
Local Authority	Sean Cremer	Director (Resources)	A					
Local Authority	Kerrie Courtaux	Education Finance Officer	P					
Local Authority	Liz Curtis-Jones	Principal Lead for Best Start in Life	A					
Local Authority	Rob Dabbs	Head of Service Business Support	P					
Local Authority	Hannah Davis	Accountant (Children's)	P					
Local Authority	Alice Deacon	Corp Dir All Age CPI Adults Commissioning	A					
Local Authority	Paul Dempsey	Executive Director (Children's)	P					
Local Authority	Ed Denham	School Admissions Manager						
Local Authority	Ellen Eager	Sufficiency and Funding Manager	P					
Local Authority	Tom Easterbrook	Schools' Forum Officer, (Clerk)	P					

Local Authority	Vanessa Eddey	Team Manager	P					
Local Authority	Jen Furnell	Corp Director – Education & Learning	P					
Local Authority	Lisa Gray	Head of Service Best Education for All	P					
Local Authority	Sharon Hammatt	Executive Assistant (Business Support Hub)						
Local Authority	Lee House	Service Manager (Finance)	P					
Local Authority	Rachel Nesbitt	Early Years Lead (Education & Funding)	A					
Local Authority	Kath Saunders	Head of Locality & Strategy - North	A					
Local Authority	Paul Scothern	Service Manager Capital Commissioning	P					

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

Appendix

Action Log

Action Ref	Meeting Date	Action	Officer	Status	Next Step
2025/07	07/11/2025	Provide data on specialist-in-mainstream placements, associated costs, and sufficiency planning for review	Ellen Eager; Hannah Davis	Open	Incorporate into regular forward plan reporting with wider inclusion data
2025/08	07/11/2025	Provide detailed update on sufficiency planning and capacity projects, including timelines for new provision	Sean Cremer; Jen Furnell	Open	Develop into regular capacity and Learning Centre reporting
2026/01	25/09/2026	Develop inclusion and Learning Centre reporting, including school-level inclusion measures and Learning Centre capacity/utilisation data, and provide a timetable for future reporting	Officer lead to be identified	Open	Report back with proposed owner and timeline

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