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Schools' Forum

Date: Friday, 6 November 2026
Time: 2.00 pm
Venue: MS Teams

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

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

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

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

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Agenda

Page No

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 - 12

To confirm the minutes of the meeting held on 25th September 2026, raise any matters arising and review the Action Log.

4. CORRESPONDENCE

To note correspondance from:

5. MAINTAINED SCHOOL FUNDING DECISIONS 2026-27 13 - 24

A: RETENTION OF FUNDING FOR EDUCATION FUNCTIONS 27-28
B: DE-DELEGATION OF FUNDING FROM MAINTAINED SCHOOLS 27-28

To consider a report from **Vanessa Eddey,** Team Manager, Children's Business & Finance Services, Business Support Hub
For Approval

6. EXCEPTIONAL CIRCUMSTANCES FUNDING 2027 – 28 25 - 28

To consider a report from **Vanessa Eddey,** Team Manager, Children's Business & Finance Services, Business Support Hub
For Consultation

7. ANNUAL REVIEW OF PLACES TO BE COMMISSIONED BY THE LOCAL AUTHORITY IN LOCAL SPECIALIST PROVISION 29 - 34

To consider a report from **Ellen Eager**, Sufficiency and Funding Manager, Commissioning Partnerships and Investments
For Consultation

8. DISTRIBUTION METHOD FOR THE 2026-27 EARLY YEARS GRANTS FOR SCHOOL BASED SETTINGS 35 - 40

To consider a report from **Vanessa Eddey,** Team Manager, Children's Business & Finance Services, Business Support Hub
For Consultation

9. DEDICATED SCHOOLS' GRANT (DSG) OUTTURN FOR 2026-27 Q2 41 - 54

To consider a report from **Lee House**, Service Manager (Finance) – Children's Services, Finance and Commercial, Corporate Development Directorate

For information

10. ANY OTHER BUSINESS

Dorset Council

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 Hardye 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 Monkies 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

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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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Dorset Schools' Forum

Date of Meeting	**6 November 2026**
Report Title	**De-delegated Decisions and Education Functions for the 2027-28 financial year** Items which may be removed from maintained schools' delegated budget shares with Schools Forum approval, including consideration of consultation feedback from schools
Executive Director	**Paul Dempsey, Executive Director, People – Children**
Director	**Jen Furnell, Corporate Director, Education and Learning**
Report Authors	Vanessa Eddey | Team Manager, Children's Business & Finance Services 01305 225918, vanessa.eddey@dorsetcouncil.gov.uk Kerrie Courtaux, Education Finance Officer | Team Manager, Children's Business & Finance Services 01305 224162, kerrie.courtaux@dorsetcouncil.gov.uk
Presenting Officers	**Vanessa Eddey, Team Manager, Schools, Finance & Support**
Report Status	**Public**
Reason for Submission to Schools' Forum	**For APPROVAL** **Under Forum power/responsibility**: 1(a) de-delegation and central retention of funding from maintained primary and secondary school delegated budgets. **Under PART 7 of School and Early Years Finance (England) regulations Items that may be Removed from Maintained Schools' Budget Shares – Primary, Secondary and Special Schools, and Pupil Referral Units** 54. Expenditure incurred for the purposes of supporting the improvement of standards in maintained schools including expenditure in relation to the authority's functions under Part 4 of the 2006 Act (schools causing concern: England).
Recommendation(s)	That maintained members of the Schools' Forum vote on each de-delegation option to determine whether funding is de-delegated / retained for maintained schools in 2027-28, based on the best interests of the whole community of applicable schools.

	That maintained members of the Schools' Forum vote on the Education Functions central retention for the purposes of school improvement, based on the best interests of the whole community of applicable schools.
Reason for Recommendation(s)	To establish whether maintained schools wish the LA to manage funding centrally on their behalf in 2027-28 for: 1. Trade Union facilities 2. Schools' contingency for termination costs of schools in financial difficulty 3. Free School Meal eligibility checking service 4. Education Functions
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

Background

The *School and Early Years Finance (England) Regulations* provide for maintained members of the Schools' Forum to make decisions annually on de-delegation of funding for specific services as detailed in the de-delegation options consultation document for the 2027-28 financial year. Funding for de-delegated services must be allocated through the local funding formula but can be passed back, or de-delegated, for maintained mainstream primary and secondary schools with Schools' Forum approval.

Education Functions is a LA central (education expenditure) retention under Regulation 11 of the Schools and Early Years Finance (England) Regulations 2025 (Part 3 of Schedule 2). Education Functions can be retained by the LA to discharge its statutory responsibilities, e.g., school improvement.

Decisions are required for de-delegation in relation to the funding for:

1. Trade Union facilities
2. Schools' contingency for termination costs of schools in financial difficulty
3. Free School Meal eligibility checking service

A decision is required for retention of funding in relation to the funding for:

1. Education Functions

Guidance for members on voting is attached at Appendix A.

Summary of responses to the consultation

26 out of 44 (59%) of maintained schools responded to the consultation:

	Respondents	Total Schools	Response %
Primary phase	15	30	50%
Secondary phase	5	7	71%
Learning Centres	2	3	67%
Special Schools	4	4	100%
Total	**26**	**44**	**59%**

Anonymised responses to the consultation are attached at Appendix B.

De-delegated items 1 - 3

		of those that responded; % in favour Primary phase	Secondary phase
1. TU facilities			
Pay in £1.34 per pupil		**73%**	0%
Pay in £1.40 per pupil		13%	0%
No de-delegation		13%	**100%**
2. Termination of employment costs			
Pay in £1.64 per pupil to increase reserves		**67%**	
Pay in £2.47 per pupil to increase reserves		27%	
Pay in £3.29 per pupil to increase reserves		0%	
No de-delegation		7%	**100%**
Pay in £3.89 per pupil to increase reserves			0%
Pay in £5.83 per pupil to increase reserves			0%
3. Free school meal checking service	**£ 0.68**	**93%**	**80%**

- The primary phase voted in favour of de-delegation for Trade Union facilities at £1.34 per pupil whereas secondary phase voted against de-delegation. Data on activity levels was not available at the time of the consultation paper, however this shows an increase of cases supported for the academic year as follows:

Formal casework and extended support for members involving multiple interventions

Whilst this shows the number of schools, some schools may have had multiple formal TU support visits

Phase/type of school	Cases supported by local reps UNISON NEU NASUWT ASCL NAHT		
	2023-24	2024-25	2025-26
Primary maintained schools	10	12	9
Secondary/middle maintained	13	14	8
Academy/special school/learning centre	23	35	54
Total	**46**	**61**	**71**

- The majority of the primary phase voted to de-delegate funding and hold it centrally for termination of employment costs for schools in financial difficulty, with the most popular rate chosen at £1.64 per pupil. As in previous years, the majority of the secondary phase voted against this de-delegation.

- Both the primary and secondary phases voted in favour of de-delegation for the free school meal checking service at £0.68 per pupil.

Per pupil de-delegated amount 2028-28 financial year

The per pupil rates for 2027-28 and total estimated amount de-delegated will be as follows:

	Per pupil de-delegated amount 2027-28 financial year		
	Primary phase	Secondary phase *	Total
	£	£	£
1. Trade Union facilities	1.34	-	7,610
2. Termination of employment costs	1.64	-	9,314
3. Free school meal checking service	0.68	0.65	7,595
Estimated totals to be updated with Oct 2026 census numbers			
Pupils / places	5,679	5,743	

** Per pupil including 6th form*

Estimates to de-delegated funding are based on the current number of maintained schools.

Education Functions

Voting for the retention of budget for Education Functions would raise approximately £0.18m. This fund would contribute to the costs of the Education Challenge Leads (ECLs) supporting and challenging maintained schools to ensure positive Ofsted inspection grades and strong outcomes for their pupils; this continues to be a LA subsidised service.

In summary 77% of respondents voted in favour of retention for Education Functions.

of those that responded; % in favour of £15 per pupil/place					
Respondents	**Total**	**Yes**	**%**	**No**	**%**
Primary phase	15	10	67%	5	33%
Secondary phase	5	4	80%	1	20%
Learning Centres	2	2	100%	0	0%
Special Schools	4	4	100%	0	0%
Total	**26**	**20**	**77%**	**6**	**23%**

	Per pupil / place retained amount 2027-28 financial year			
	Primary phase	Secondary phase *	Special Schools & Learning Centres	Total
	£	£	£	£
Education Functions	15.00	15.00	15.00	187,300
Total per phase	**85,200.00**	**86,100.00**	**16,000.00**	**187,300**

**Per pupil including 6th form for Education Functions*

If Forum members decide to vote against Education Functions, Dorset Council have the right of appeal to the Secretary of State to seek to demonstrate that the retention is necessary to ensure that Dorset Council are adequately funded to exercise school improvement activities.

2. Financial implications

The total funds raised for 2027-28 from de-delegation represent the best estimate available to the LA at the point when the consultation document was produced. They are based on schools' October 2025 Number on Roll (adjusted for known changes) and will be updated to reflect the number of pupils in maintained schools as at the October 2026 census.

3. Well-being and Health implications

None identified.

4. Climate Implications

None identified.

5. Other implications

None identified.

6. Risk Assessment

Each decision has financial implications for schools and carries risks for schools and services. Details of risks relating to each specific item for de-delegation are outlined in the De-delegation Decisions for the 2026-27 financial year consultation document.

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

7. Equalities Impact Assessment (EqIA)

Not required.

8. Appendices

Appendix A: De-delegation guidance on voting
Appendix B: Consultation responses

9. Background Papers

De-delegation consultation document: https://www.dorsetnexus.org.uk/Page/10963

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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De-delegation & Education Functions: Guidance on Voting

For the purposes of making decisions on de-delegation, only maintained school members of the Schools' Forum may vote on the proposals. De-delegation is not an option for academies.

For items 1. Trade Union Facilities, 2. Schools' contingency for termination costs of schools in financial difficulty and 3. Free School Meal eligibility checking service only **mainstream** maintained school members of the Schools' Forum may vote on the proposals for their phase, as follows:

- primary representatives will vote on behalf of the primary phase.
- middle and secondary representatives will vote on behalf of the secondary phase which includes middle schools.

For Education Functions (School Improvement) this is a retention and all maintained schools' representatives (including special schools and learning centres) will vote together on behalf of all maintained schools.

When voting, members must take account of the views and needs of the maintained school community for their phase in Dorset (and wider maintained school community for item 4). To assist in this, the Local Authority has undertaken a consultation with schools, and a summary of the responses by phase has been circulated for the information of Forum members in advance of the meeting at which voting takes place.

When considering the consultation feedback from schools, **members are reminded that a consultation is a discussion aimed at ascertaining opinions / preference. It is <u>not</u> a straightforward vote.** Whilst responses to the consultation will provide Forum members with an indication of schools' views, members are reminded to think strategically about the best interests and needs of all the schools in their phase (and wider maintained school community for Education Functions) when deciding how to vote. Comments should be considered carefully alongside the percentage of votes.

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Appendix B

ID	Phase	Would you prefer to de-delegate funding in 2027-28 to continue to provide a central fund to support TU facilities?	Do you have any other comments on Trade Union facilities?	PRIMARY PHASE ONLY - Do you agree that funding should be de-delegated to establish a fund administered centrally by the Local Authority to help pay for the termination of employment costs of schoo...	SECONDARY PHASE ONLY - Do you agree that funding should be de-delegated to establish a fund administered centrally by the Local Authority to pay for the termination of employment costs of schools ...	Do you have any other comments on Termination of Employment Costs Contingency?	Would you prefer funding to be de-delegated in 2027-28 at £0.68 per pupil to provide a central Free School Meals Eligibility Checking Service?	Do you have any other comments on Free School Meals Eligibility Checking Service?	Would you support the retention of c£187,300 to support the LA to provide school improvement services to maintained schools at a cost of £15.00 per pupil?	Do you have any other comments on Education Functions | School Improvement?
1	Secondary (including middle) maintained	No my school will take responsibility for funding its own TU facilities			1.No my school will take responsibility for funding 100% of any termination of employment costs.		No my school will take on the responsibility for FSM eligibility checking	Is there not a free checker from the DfE now?	Yes I would support the de-delegation of £15.00 per pupil	
2	Secondary (including middle) maintained	No my school will take responsibility for funding its own TU facilities			1.No my school will take responsibility for funding 100% of any termination of employment costs.		Yes de-delegate funding to provide a central checking service as effective and efficient as possible		No I do not support the de-delegation	
3	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		1.Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.	~~2.Yes de-delegate funding and hold it centrally. Pay in £3.89 per pupil for 2027-28 to raise a fund of approximately £22,300.~~		Yes de-delegate funding to provide a central checking service as effective and efficient as possible		No I do not support the de-delegation	
4	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		1.Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.	~~2.Yes de-delegate funding and hold it centrally. Pay in £3.89 per pupil for 2027-28 to raise a fund of approximately £22,300.~~		Yes de-delegate funding to provide a central checking service as effective and efficient as possible		No I do not support the de-delegation	
5	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		1.Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	We find the Educational and School Improvement functions really useful and would want them to continue and grow.
6	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil	No	1.Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.		No	Yes de-delegate funding to provide a central checking service as effective and efficient as possible	No	No I do not support the de-delegation	No
7	Primary maintained	No my school will take responsibility for funding its own TU facilities		4.No my school will take responsibility for funding 100% of any termination of employment costs.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible	With the new rules on checking free school meals we feel this is really important!	No I do not support the de-delegation	
8	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		1.Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	
9	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.40 per pupil		2.Yes de-delegate funding and hold it centrally. Pay in £2.47 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £14,000.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	What does the £15 per pupil contribution to Education Functions look like in practice for maintained schools in 2027–28? In particular, what level of ECL support, school improvement activity and direct engagement can schools expect to receive, and how will the impact and value for money of this be evaluated?

Appendix B

ID	Phase	Would you prefer to de-delegate funding in 2027-28 to continue to provide a central fund to support TU facilities?	Do you have any other comments on Trade Union facilities?	PRIMARY PHASE ONLY - Do you agree that funding should be de-delegated to establish a fund administered centrally by the Local Authority to help pay for the termination of employment costs of schoo...	SECONDARY PHASE ONLY - Do you agree that funding should be de-delegated to establish a fund administered centrally by the Local Authority to pay for the termination of employment costs of schools ...	Do you have any other comments on Termination of Employment Costs Contingency?	Would you prefer funding to be de-delegated in 2027-28 at £0.68 per pupil to provide a central Free School Meals Eligibility Checking Service?	Do you have any other comments on Free School Meals Eligibility Checking Service?	Would you support the retention of c£187,300 to support the LA to provide school improvement services to maintained schools at a cost of £15.00 per pupil?	Do you have any other comments on Education Functions | School Improvement?
10	Secondary (including middle) maintained	No my school will take responsibility for funding its own TU facilities			1.No my school will take responsibility for funding 100% of any termination of employment costs.		Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	
11	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		1.Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	
12	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil	No	2.Yes de-delegate funding and hold it centrally. Pay in £2.47 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £14,000.		No	Yes de-delegate funding to provide a central checking service as effective and efficient as possible	No	Yes I would support the de-delegation of £15.00 per pupil	This service is invaluable to small primary schools like ours. The support during our recent Ofsted Inspection was amazing. As a collaboration of schools we work closely with our ECL. They have also supported our HTPM which has saved us employing expensive external providers. We find our regular visits both challenging and supportive and help drive school improvement.
13	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		1.Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	
14	Secondary (including middle) maintained	No my school will take responsibility for funding its own TU facilities			1.No my school will take responsibility for funding 100% of any termination of employment costs.		Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	
15	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		2.Yes de-delegate funding and hold it centrally. Pay in £2.47 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £14,000.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	This service is invaluable to small primary schools like ours. The support during in preparation for our upcoming Ofsted Inspection is vital. As a collaboration of schools we work closely with our ECL. They have also supported our HTPM which has saved us employing expensive external providers. We find our regular visits both challenging and supportive and help drive school improvement.
16	Secondary (including middle) maintained	No my school will take responsibility for funding its own TU facilities			1.No my school will take responsibility for funding 100% of any termination of employment costs.		Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	
17	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		2.Yes de-delegate funding and hold it centrally. Pay in £2.47 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £14,000.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	

Appendix B

ID	Phase	Would you prefer to de-delegate funding in 2027-28 to continue to provide a central fund to support TU facilities?	Do you have any other comments on Trade Union facilities?	PRIMARY PHASE ONLY - Do you agree that funding should be de-delegated to establish a fund administered centrally by the Local Authority to help pay for the termination of employment costs of schoo...	SECONDARY PHASE ONLY - Do you agree that funding should be de-delegated to establish a fund administered centrally by the Local Authority to pay for the termination of employment costs of schools ...	Do you have any other comments on Termination of Employment Costs Contingency?	Would you prefer funding to be de-delegated in 2027-28 at £0.68 per pupil to provide a central Free School Meals Eligibility Checking Service?	Do you have any other comments on Free School Meals Eligibility Checking Service?	Would you support the retention of c£187,300 to support the LA to provide school improvement services to maintained schools at a cost of £15.00 per pupil?	Do you have any other comments on Education Functions | School Improvement?
18	Primary maintained	No my school will take responsibility for funding its own TU facilities	We already provide schools with facilities.	Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		Yes I would support the de-delegation of £15.00 per pupil	
19	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.34 per pupil		Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.			Yes de-delegate funding to provide a central checking service as effective and efficient as possible		No I do not support the de-delegation	
20	Primary maintained	Yes de-delegate funding and hold it centrally. Pay in £1.40 per pupil		Yes de-delegate funding and hold it centrally. Pay in £1.64 per pupil for 2027-28 and raise additional funds, to increase the reserve by approximately £9,300.			No my school will take on the responsibility for FSM eligibility checking		Yes I would support the de-delegation of £15.00 per pupil	It would be good to understand what this money supports and supplies to the school.
21	Special School								Yes I would support the retention of £15.00 per place	
22	Special School								Yes I would support the retention of £15.00 per place	We have been very pleased with the effectiveness and the support we receive from School Improvement Services, it has done much to ensure the quality of what we provide for our children and is of great benefit to our self-evaluation processes.
23	Special School								Yes I would support the retention of £15.00 per place	
24	Special School								Yes I would support the retention of £15.00 per place	
25	Learning Centre								Yes I would support the retention of £15.00 per place	No
26	Learning Centre								Yes I would support the retention of £15.00 per place	No

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Dorset Schools' Forum

Date of Meeting:	**6th November 2026**
Report Title:	**SCHOOLS BLOCK DISAPPLICATION REQUESTS IN RESPECT OF EXCEPTIONAL CIRCUMSTANCES**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Corporate Director:	**Jen Furnell, Director for Education and Learning**
Presenting Officer:	**Vanessa Eddey, Team Manager – Childrens Business & Finance Services**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For CONSULTATION** **Under Forum power/responsibility**: 1Consulation on Dis-application for Inadequate Facilities
Recommendation(s):	That the Schools' Forum: 1. Approves the Dis-application for inadequate facilities
Reason for Recommendation(s):	Funding for two schools to cover the costs of inadequate facilities
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 A disapplication request will need to be submitted to the DfE before 16 November 2026 in respect of two Schools Block exceptional funding requests for 2027-28. Funding requests for both schools were agreed by the DfE and the in 2026-27, but it is necessary to reapply each year. Part of the process for agreeing the request involves consultation with the Schools Forum.

1.2 Funding is being requested as follows:

- Cheselbourne Village School does not have a school hall and therefore has inadequate PE facilities. Hiring Cheselbourne Village Hall enables the delivery of PE, especially gymnastics and dance, alongside Move to Learn interventions which supports pupils' fine and gross motor development. It is the only space large enough for all pupils to eat lunch together safely and is also used for assemblies and group events.

  In 2026-27 the rental agreement costs £6,664.57. Other options considered are building a school hall, but there is not enough space on the school site or renting the leisure centre, but this is more expensive.

- The Dorset Studio School serves a predominantly rural community and is co-located with Coastland College (Kingston Maurward site), giving students access to specialist land-based and animal care facilities. A service level agreement is in place to use College facilities, providing students with access to extensive land-based, animal care and outdoor learning facilities, which lead to level 2 qualifications. These facilities support inclusive, practical learning opportunities that engage students with a wide range of learning needs, abilities and aspirations. This curriculum enhances those opportunities by reducing barriers associated with rural isolation, transport limitations and financial disadvantage. Other options are not available to offer this curriculum.

  The charges are £491.59 per month x 12 (5,899.08) for internet and £105,868 divided into 12 monthly payments for access to the estate and facilities – Total £111,767.08. This is the 2025-26 charge as the new contract for 2026-27 has not been received at the time of writing this paper.

1.3 Total amount for the 2 schools is £118,431.65.

1.4 This £118,431.65 disapplication request will reduce the total funding available to other mainstream schools in Dorset in 2027-28. Based on last years Authority Planning Tool (APT), this equates to £2.37 per primary pupil, £3.32 per KS3 pupil and £3.74 per KS4 pupil.

2. Well-being and Health implications

If the opportunities funded by the disapplication requests were not available, this would have a detrimental effect on the wellbeing of students. Both schools are rural and are keen provide inclusion opportunities.

3. Climate Implications

Not applicable

4. Risk Assessment

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

5. Equalities Impact Assessment (EqIA)

Cheselbourne School require access to the village hall to give equality of opportunity to access a balanced curriculum and include pupils in wider school life.

The Dorset Studio School's specialist curriculum, has a positive impact on equality of opportunity, particularly for disadvantaged learners, students with SEND and young people who thrive in practical vocational environments. No adverse equality impacts have been identified.

6. Appendices

7. Background Papers

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

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

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

Dorset Schools' Forum

Date of Meeting:	**6 November 2026**
Report Title:	**ANNUAL REVIEW OF PLACES TO BE COMMISSIONED BY THE LA IN LOCAL SPECIALIST PROVISION**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Director:	**Jen Furnell, Corporate Director, Education and Learning**
Report Authors: Title: Tel: Email:	Ellen Eager Sufficiency & Funding Manager | Commissioning Partnerships and Investments 01305 224562 Ellen.eager@dorsetcouncil.gov.uk
Presenting Officer:	**Ellen Eager, Sufficiency & Funding Manager, Commissioning Partnerships and Investments**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For CONSULTATION** **Under Forum power/responsibility**: 2(b) annual consultation on financial issues relating to the arrangements for education of pupils with special educational needs and disabilities, in particular, the places to be commissioned by the LA and the arrangements for paying top up funding
Recommendation(s):	That Schools Forum note and comment on the number of places we currently anticipate commissioning for September 2027 in specialist places in publicly funded provision.
Reason for Recommendation(s):	The SEND funding system is built around commissioning places in advance of the year to enable planning by those institutions. The numbers proposed (which are subject in some cases to further consultation) are our realistic estimate of the number of specialist places we need and can provide for pupils with SEND.
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.**

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1. Executive Summary

1.1. Dorset is required to provide the Department for Education (DfE) with the number of places it wishes to commission in academies, and colleges within the Dorset geographical area by 6 November 2026. For consistency and to enable planning, we aim to provide all schools with their commissioned places at the same time where possible. The proposed number of places to be commissioned is shown in Appendix A.

1.2. Dorset is required to commission all the places for children and young people (CYP) at providers in the Dorset geographical area regardless of where the CYP is resident. The High Needs National Funding Formula takes account of the numbers of pupils that the LA is commissioning on behalf of other local authorities by adjusting the formula for the following year based upon whether Dorset is a net importer of CYP or a net exporter.

1.3. The LA is permitted to pay providers for additional places (or the marginal cost of an additional CYP) in year but is not allowed to remove place funding once it is allocated, to allow the provider some financial clarity and stability in funding.

1.4. The number of places commissioned is a key part of the budget build for the year 2027-28 as it gives the number of places we expect to pay for but also gives an indication of the budget requirement for top ups.

2. **Specialist Inclusion Bases (previously Resourced Provision):** Continued expansion of Dorset's Specialist Inclusion Bases is key to the SEND transformation plan. Inclusion Bases will be opened in phased tranches across localities and phases growing capacity over the coming years. Dorset will also look to add additional places to existing bases where necessary.

2.1. The Physical Disability bases for pupils with complex physical disability with medical needs at The Prince of Wales school, Dorchester Middle School (DMS) and the Thomas Hardye School work slightly differently and as part of the funding arrangements we stated that we will commission at 5, 8 or 10 places. For September 2027 we are not proposing any changes to the 5 at Dorchester Middle School, 8 at The Prince of Wales School and 8 at The Thomas Hardye School.

2.2. **Learning Centres:** The Learning Centre places are provisionally commissioned numbers as ongoing sufficiency work continues along with expansion projects. These commissioned places may change ahead of September 2027.

3. **Special Schools:** Our local special schools are full to physical capacity. The numbers included in the forms are the most reasonable numbers that the schools have identified to ensure that they will take as many pupils as possible. In some cases, they may be able to take an additional student where there is a good fit for the pupil in a specific class.

3.1. **Further Education Colleges:** Dorset increased the commissioned number from 340 to 370 for September 2026 for Coastlands College and plan to commission 370 again for September 2027.

3.2. **Unallocated Additional Places:** When creating a budget for places for the financial year 2027-28 we have provided an additional budget for unallocated places so that the budget set does not automatically overspend when the first additional pupil appears. This also takes account of additional projects planned, but where timing has not yet been confirmed.

:

1. Financial Implications

These commissioned places will commit the High Needs Budget to expenditure in total of £17.9m for 2,056 places comprising:

- £1.76m for 293 places in Specialist Inclusion Bases,
- £3.97m for 397 alternative provision places in our learning centres,
- £2.2m for 370 places in further education colleges.
- £9.96m for 996 places in special schools
- Included in the figures above is £0.4m set aside to pay for additional places where needed and in new Specialist Inclusion Bases planned.

This will all be funded from the High Needs Block in 2027-28 and 2028-29.

2. Health and Well-being implications

None

3. Climate Implications

None

4. Risk Assessment

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

5. Appendices

Appendix A: Places in Specialist Provision for September 2027

6. Background Papers

None

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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23-Oct-26 **FOR SCHOOLS FORUM**

Provision	Type	Area / Other	Name	Type	Place cost	Dorset pupils 26-27	Non Dorset (if known)	Total NOR	2027/28 To be Commissioned for AY Sept 2027	2027/28 Place Funding - £	2026/27 To be Commissioned for AY Sept 2026	2026/27 Place Funding - £	2025/26 Commissioned for AY Sept 2025	2025/26 Place Funding - £	2024/25 Commissioned for AY Sept 2024	2024/25 Place Funding - £	2023/24 Commissioned for AY Sept 2023	2023/24 Place Funding - £	2022/23 Commissioned for AY Sept 2022	2022/23 Place Funding - £
SIB	CCN	East	Parley First School	Academy	6,000	3		3	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000
SIB	CCN	East	West Moors Middle School	Maintained	6,000	7	*4*	11	12	72,000	12	72,000	10	60,000	10	60,000	10	60,000	10	60,000
SIB	CCN	East	Ferndown Upper	Maintained	6,000	10		10	10	60,000	10	60,000	10	60,000	10	60,000				
SIB	CCN	North	Gillingham Primary School	Academy	6,000	11		11	14	84,000	14	84,000	14	84,000	14	84,000	14	84,000	14	84,000
SIB	CCN	North	Gillingham School	Academy	6,000	8		8	14	84,000	14	84,000	14	84,000	14	84,000				
SIB	CCN	Dorchest	Damers First School	Academy	6,000	9		9	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000
SIB	CCN	Dorchest	St Mary's Middle Puddletown	Academy	6,000	10		10	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000
SIB	CCN	Dorchest	Thomas Hardye School	Academy	6,000	9		9	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000	10	60,000
SIB	CCN	West	Bridport St Mary Primary	Academy	6,000	12		12	16	96,000	16	96,000	14	84,000	14	84,000	14	84,000		
SIB	CCN	Chesil	Budmouth School	Academy	6,000	11		11	14	84,000	14	84,000	12	72,000	12	72,000	12	72,000	12	72,000
SIB	CCN	Chesil	Bincombe Valley	Maintained	6,000	15		15	16	96,000	16	96,000	14	84,000	14	84,000				
SIB	SEMH	Chesil	Wyke Regis infants & juniors	Maintained	6,000	12		12	14	84,000	14	84,000	14	*84,000*	14	*84,000*				
SIB	PD	Dorset	Prince of Wales School	Maintained	6,000	6		6	8	48,000	8	48,000	8	48,000	8	48,000	8	48,000	8	48,000
SIB	PD	Dorset	Dorchester Middle School	Academy	6,000	3		3	5	30,000	5	30,000	5	30,000	10	60,000	8	48,000	10	60,000
SIB	PD	Dorset	Thomas Hardye School	Academy	6,000	7		7	8	48,000	8	48,000	8	48,000	8	48,000	8	48,000	8	48,000
SIB	CCN	West	Beaminster	Maintained	6,000	10		10	12	72,000	12	72,000	10							
SIB	CCN	Purbeck	Sandford St Martin	Maintained	6,000	4		4	14	84,000	14	84,000	14							
SIB	CCN	West	Woodroffe	Maintained	6,000	8		8	10	60,000	10	60,000	6							
SIB	CCN	Purbeck	The Purbeck School	Academy	6,000	6		6	14	84,000	14	84,000	14							
SIB	*C&L*	*West*	*The Sir John Colfox Academy*	*Academy*	*6,000*		*to open in yr*		*8*	*48,000*										
SIB	*SEMH*	*West*	*Bridport Primary School*	*Academy*	*6,000*		*to open in yr*		*8*	*48,000*										
SIB	*C&L*	*Dorchest*	*Manor Park CE First School*	*Academy*	*6,000*		*to open in yr*		*8*	*48,000*										
SIB	Other		Extra in year places & planned new bases	spare	6,000				48	288,000	49	294,000		-	30	180,000	30	180,000	30	180,000
RP			**TOTAL Specialist Inclusion Bases**						**293**	**1,758,000**	**270**	**1,620,000**	**207**	**978,000**	**184**	**1,044,000**	**144**	**864,000**	**132**	**792,000**
AP	AP	LC	Dorchester Learning Centre	Maintained	10,000			74	112	1,120,000	100	1,000,000	92	920,000	68	680,000	68	680,000	68	680,000
AP	AP	LC	The Compass Centre	Maintained	10,000			52	82	820,000	82	820,000	82	820,000	67	670,000	67	670,000	67	670,000
AP	AP	LC	The Forum Centre	Maintained	10,000			66	100	1,000,000	100	1,000,000	100	1,000,000	66	660,000	66	660,000	66	660,000
AP	AP	LC	Harbour Vale	Academy	10,000			27	53	530,000	53	530,000	53	530,000	53	300,000	38	380,000	38	380,000
AP	AP	LC	The Forum Centre Woodlands School	Maintained	10,000				40	400,000	40	400,000	0							
AP	AP	LC	Extra in year places (unallocated)	spare	10,000				10	100,000	12	120,000	10	100,000	30	300,000				
AP			**TOTAL AP in Learning Centres**						**397**	**3,970,000**	**387**	**3,870,000**	**337**	**3,370,000**	**261**	**2,610,000**	**239**	**2,390,000**	**239**	**2,390,000**
FE		Dorset	Coastland College	College	6,000	262	51	313	370	2,220,000	370	2,220,000	340	2,040,000	320	1,920,000	312	1,872,000	315	1,890,000
FE			Extra in year places (unallocated)	spare	6,000							-	10	60,000	10	60,000	10	60,000	20	120,000
FE	**ALL**		**TOTAL Colleges**						**370**	**2,220,000**	**370**	**2,220,000**	**350**	**2,100,000**	**330**	**1,980,000**	**322**	**1,932,000**	**335**	**2,010,000**
	Special School		Beaucroft (inc Beaucroft College)	Maintained	10,000	154	77	231	240	2,400,000	240	2,400,000	230	2,300,000	230	2,300,000	215	2,150,000	215	2,150,000
	Special School		Mountjoy	Maintained	10,000	93	14	107	110	1,100,000	110	1,100,000	110	1,100,000	100	1,000,000	100	1,000,000	100	1,000,000
	Special School		Harbour School Dorset	Academy	10,000	109	31	140	140	1,400,000	140	1,400,000	140	1,400,000	130	1,300,000	128	1,280,000	110	1,100,000
	Special School		Westfield	Maintained	10,000	225	2	227	230	2,300,000	230	2,300,000	230	2,300,000	230	2,300,000	210	2,100,000	210	2,100,000
	Special School		Wyvern	Academy	10,000	90	0	90	90	900,000	90	900,000	90	900,000	90	900,000	90	900,000	90	900,000
	Special School		Yewstock	Maintained	10,000	153	10	163	165	1,650,000	165	1,650,000	165	1,650,000	165	1,650,000	165	1,650,000	165	1,650,000
			Extra in year places (unallocated)	spare	10,000				21	210,000	23	230,000	10	100,000	26	260,000	16	160,000	16	160,000
			TOTAL Special Schools						**996**	**9,960,000**	**998**	**9,980,000**	**975**	**9,750,000**	**971**	**9,710,000**	**924**	**9,240,000**	**906**	**9,060,000**
	TOTAL								**2056**	**17,908,000**	**2025**	**17,690,000**	**1869**	**16,198,000**	**1746**	**15,344,000**	**1629**	**14,426,000**	**1612**	**14,252,000**

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Dorset Schools' Forum

Date of Meeting:	**6 November 2026**
Report Title:	**Distribution method for 2026-27 early years grants to school-based settings**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Corporate Director:	**Jen Furnell, Corporate Director for Education and Learning**
Report Author: Title: Tel: Email:	Vanessa Eddey Team Manager Schools, Finance & Support 01305 225918 vanessa.eddey@dorsetcouncil.gov.uk
Presenting Officer:	**Vanessa Eddey, Team Manager, Schools, Finance & Support** **Officer Schools, Finance & Support**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For CONSULTATION** **Under Forum power/responsibility**: 2(b)(ii) Early Years Provision
Recommendation(s):	**The Schools Forum consider and approve the methodology of distribution two grants to school-based early years settings: Early years teachers' pay grant (EYTPG) 2026-27 and Early years free school meals (EYFSM) expansion grant 2026-27**
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

1.1 Two grants are available to eligible school-based early years settings. A school-based nursery setting has an age range to include early years pupils and structures the school with early years classes. This paper details the proposed distribution method for the Early years teachers' pay grant (EYTPG) 2026-27 and Early years free school meals (EYFSM) expansion grant 2026-27 for consultation purposes.

1.2 Early years teachers' pay grant (EYTPG) 2026-27

The EYTPG will provide additional funding in 2026 to 2027 to support eligible public sector early years settings with the costs of the schools teachers' pay award from September 2026 to March 2027. After this period, the funding is included in funding rates. The grant is available to public sector early years provision in schools (maintained and academies) and governor-run academies and maintained nursery schools. Local authorities must ensure that all the EYTPG funding received is distributed to eligible EY settings in their area using local part time equivalent (PTE) data in conjunction with the rates information which have been published by the Department for Education (DfE) in the rates tables.

1.2.1 Dorset has received the following grant for the September 2026 to March 2027 period:

	PTE	Dorset Rate	PTE x Rate	25/38ths	TPAG Allocation
3- & 4-year-old universal	750.42	£60.00	£45,025.20	£29,621.84	
3- & 4-year-old additional	305.71	£60.00	£18,342.60	£12,067.50	£41,690.00
2-year-old EL2s	142.43	£79.00	£11,251.97	£7,402.61	
2-year-old working	74.42	£79.00	£5,879.18	£3,867.88	£11,271.00
Under 2 working	0	£106.00	£0.00	£0.00	
			£80,498.95		£52,961.00

The rates above are for a full year and are reduced to 25/38ths to reflect the September 2026 to March 2027 period.

1.2.2 Full grant calculations are shown in Appendix A.

1.2.3 There are separate TPAG calculations for 3- & 4-year-olds and 2-year-olds to reflect the different grant rates. The columns are labelled alphabetically to identify the calculations:

Data for grant calculations					Teachers' Pay Grant 2026-27			
D	E	F	G	H	I	J		L
Age 3&4 PTE	% of total Age 3&4 PTE	Age 2 PTE	% of total Age 2 PTE	Total PTE	TPAG Age 3&4	TPAG Age 2	**TPAG**	**Total**

- Total part-time equivalent (PTE) amounts from the spring 2026 census have been used (see columns D and F).
- For new settings, data from autumn term actuals has been used.
- The PTE amounts are shown as percentages of the total PTE (see columns E and G).
- The grant allocation is calculated by multiplying the percentage of PTE by the total available grant (see columns I and J).
- The total TPAG allocation is shown in column L.

1.2.4 For example:

A school with 3- & 4-year-old PTE of 34.07 receives 3.06% x £41,690 = £1,274.78 (I)

A school with 2-year-old PTE of 12.53 receives 5.17% x £11,271 = £ 583.15 (J)

Total Teachers Pay Grant £1,857.93 (L)

1.3 Early Years Free School Meals (EYFSM) Expansion Grant 2026-27

From the 2026 to 2027 academic year, the eligibility criteria for free school meals (FSM) in England expanded to include all children in households receiving Universal Credit, including those in eligible early years settings. . In order to receive a free school meal, an early years child must be a registered pupil and attend both before and after the lunch break. A pupil is only eligible to receive a free school meal where a claim for this support has been made, and their eligibility has been verified by the school where they are enrolled or by the local authority.

The EYFSM expansion grant is available to state-funded school-based nurseries to cover the increased cost of free school meals from September 2026.

1.3.1 Dorset has received a grant of £39,534 to allocate to school based early years settings for the period September 2026 to March 2027.

1.3.2 The proposed distribution method is to use a combination of FSM data (likelihood) and PTE data (volume) to distribute the funding in proportion to the expected level of FSM costs.

1.3.3 Columns are labelled in Appendix A to show the grant calculation:

	Free School Meals Expansion Grant 2026-27		
C	M	N	O
APT FSM proportion	APT FSM proportion x PTE	% of grant	**FSM Expansion Grant Total**

- FSM proportion data by school has been used, from the APT (Authority Planning Tool) spreadsheet used to distribute the 2026-27 schools block of the dedicated schools block (see column C in Appendix A). This is school level pupil-based data, based on the October 2025 census, showing the likelihood of a pupil in the school being eligible for FSM.

- The FSM proportion is multiplied by the total PTE for each setting to combine the number of pupils (volume) with the likelihood of pupils being eligible for FSM (see column M). This combines the volume and likelihood of FSM by each school.

- The combined volume and likelihood in column M is expressed as a percentage of the total in column N.

- The percentage in column N is multiplied by the available grant of £39,534 to give an allocation for each school (see column O).

1.3.4 For example:

For a school with an APT FSM proportion of 0.27 and total PTE of 46.60, the grant would be:

0.27 x 46.6 = 12.58

12.58 divided by 237.06 (the total of column M) = 5.31%

5.31% x £39,534 (total available grant) = £2,098.26

1.4 Conclusion

The proposed distribution methods for the two grants take account of the size of early years settings together with the likelihood of cost being incurred.

2. Financial Implications

n/a

3. Climate Implications

n/a

4. Other implications

n/a

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)

n/a

7. Appendices

Appendix A – Grant calculation and proposed distribution

8. Background Papers

Early years teachers' pay grant (EYTPG) for 2026 to 2027 - GOV.UK

Early years free school meals (EYFSM) expansion grant: 2026 to 2027 - GOV.UK

Footnote:

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

Early Years School Based Nursery Grant distribution

		Data for grant calculations						Teachers' Pay Grant 2026-27			Free School Meals Expansion Grant 2026-27		
A	B	C	D	E	F	G	H	I	J	L	M	N	O
DFE No.	Setting Name	APT FSM proportion	Age 3&4 PTE	% of total Age 3&4 PTE	Age 2 PTE	% of total Age 2 PTE	Total PTE	TPAG Age 3&4	TPAG Age 2	**TPAG Total**	APT FSM proportion x PTE	% of grant	**FSM Expansion Grant Total**
639732	Archbishop Wake Nursery	0.27	34.07	3.06%	12.53	5.17%	46.60	£1,274.78	£583.15	**£1,857.93**	12.58	5.31%	**£2,098.26**
537811	Barn Owls Pre-School (Hazelbury Bryan)	0.17	24.60	2.21%	7.67	3.16%	32.27	£920.54	£356.71	**£1,277.25**	5.49	2.31%	**£914.77**
517385	Bere Regis Primary And Pre-School	0.19	25.40	2.28%	3.30	1.36%	28.70	£950.48	£153.54	**£1,104.02**	5.45	2.30%	**£909.38**
537874	Bincombe Buds at Bincome Valley	0.46	27.00	2.42%	9.00	3.72%	36.00	£1,010.35	£418.75	**£1,429.10**	16.56	6.99%	**£2,761.65**
513121	Broadmayne First School and Nursery	0.06	26.20	2.35%	7.40	3.05%	33.60	£980.41	£344.31	**£1,324.72**	2.02	0.85%	**£336.20**
537896	Buckland Newton Ce Primary School	0.16	10.73	0.96%	6.17	2.55%	16.90	£401.64	£286.92	**£688.56**	2.70	1.14%	**£450.94**
639624	Burton Bradstock Ce Primary School Pre-School	0.09	6.80	0.61%	0.00	0.00%	6.80	£254.46	£0.00	**£254.46**	0.61	0.26%	**£102.06**
639634	Cerne Abbas Pre-School	0.06	20.47	1.84%	0.00	0.00%	20.47	£765.87	£0.00	**£765.87**	1.23	0.52%	**£204.79**
639639	Charmouth Primary School Nursery	0.38	5.80	0.52%	0.00	0.00%	5.80	£217.04	£0.00	**£217.04**	2.20	0.93%	**£367.55**
537862	Chattichicks (Chickerell Primary Academy)	0.22	34.07	3.06%	7.70	3.18%	41.77	£1,274.78	£358.27	**£1,633.05**	9.19	3.88%	**£1,532.37**
537932	Cheeky Monkeys After School Club At Beechcroft St Paul's	0.47	11.17	1.00%	5.80	2.39%	16.97	£417.86	£269.86	**£687.72**	7.97	3.36%	**£1,329.86**
639575	Cheselbourne Village School And Pre-School	0.29	4.80	0.43%	0.00	0.00%	4.80	£179.62	£0.00	**£179.62**	1.39	0.59%	**£232.14**
639719	Corfe Castle Ce Primary School - Pre-School	0.28	18.93	1.70%	10.18	4.20%	29.12	£708.49	£473.81	**£1,182.30**	8.15	3.44%	**£1,359.60**
583033	Cranborne First School	0.16	13.60	1.22%	0.00	0.00%	13.60	£508.92	£0.00	**£508.92**	2.18	0.92%	**£362.89**
639723	Damers First School Nursery	0.18	19.57	1.76%	12.03	4.97%	31.60	£732.32	£559.73	**£1,292.05**	5.69	2.40%	**£948.57**
525005	Downlands Primary School	0.03	37.33	3.35%	8.00	3.30%	45.33	£1,397.02	£372.22	**£1,769.24**	1.36	0.57%	**£226.80**
639731	Dunbury Preschool	0.13	7.93	0.71%	0.80	0.33%	8.73	£296.87	£37.22	**£334.09**	1.14	0.48%	**£189.34**
537798	Durweston Pre-School	0.09	18.75	1.68%	0.00	0.00%	18.75	£701.63	£0.00	**£701.63**	1.69	0.71%	**£281.42**
537906	Frome Valley First School	0.21	18.40	1.65%	4.00	1.65%	22.40	£688.53	£186.11	**£874.64**	4.70	1.98%	**£784.47**
537876	Holy Trinity C of E Primary School & Community Nursery	0.32	33.20	2.98%	8.80	3.63%	42.00	£1,242.35	£409.45	**£1,651.80**	13.44	5.67%	**£2,241.35**
639566	Little Acorns At St Mary's Thorncombe CE Primary Academy	0.30	3.03	0.27%	3.81	1.57%	6.84	£113.51	£177.21	**£290.72**	2.05	0.87%	**£342.31**
594509	Little Birch Preschool (Blandford St Mary)	0.27	35.08	3.15%	13.03	5.38%	48.12	£1,312.83	£606.41	**£1,919.24**	12.99	5.48%	**£2,166.56**
639659	Little Caterpillars Nursery (Wimborne First)	0.13	31.88	2.86%	7.95	3.28%	39.83	£1,192.87	£370.02	**£1,562.89**	5.18	2.18%	**£863.51**
639586	Loders Nursery @ Loders Primary Academy	0.16	7.15	0.64%	0.00	0.00%	7.15	£267.56	£0.00	**£267.56**	1.14	0.48%	**£190.78**
512377	Lytchett Matravers Primary School	0.10	70.20	6.30%	11.40	4.71%	81.60	£2,626.91	£530.42	**£3,157.33**	8.16	3.44%	**£1,360.82**
519243	Manor Park Pre-School	0.20	59.00	5.30%	19.20	7.93%	78.20	£2,207.80	£893.34	**£3,101.14**	15.64	6.60%	**£2,608.24**
639543	Oakhurst Community First School	0.24	32.93	2.96%	3.27	1.35%	36.20	£1,232.38	£151.99	**£1,384.37**	8.69	3.66%	**£1,448.87**
537824	Piddle Valley CE First School	0.21	3.97	0.36%	0.00	0.00%	3.97	£148.43	£0.00	**£148.43**	0.83	0.35%	**£138.92**
516762	Prince Of Wales First School	0.10	39.13	3.51%	12.77	5.27%	51.90	£1,464.38	£594.01	**£2,058.39**	5.19	2.19%	**£865.52**
639677	Sixpenny Handley First School Nursery	0.09	14.14	1.27%	3.07	1.27%	17.20	£529.00	£142.69	**£671.69**	1.55	0.65%	**£258.21**
582843	St George's (Bourton) Shining Star Pre School	0.09	19.70	1.77%	7.07	2.92%	26.77	£737.18	£328.80	**£1,065.98**	2.41	1.02%	**£401.74**
519930	St George's Primary School & Pre-School (Langton Matravers)	0.17	12.77	1.15%	2.43	1.00%	15.20	£477.73	£113.22	**£590.95**	2.58	1.09%	**£430.93**
519254	St Ives Primary And Nursery School Nursery Unit	0.06	33.00	2.96%	2.80	1.16%	35.80	£1,234.87	£130.28	**£1,365.15**	2.15	0.91%	**£358.22**
515764	St James (Gaunts Common)	0.03	11.23	1.01%	6.00	2.48%	17.23	£420.35	£279.17	**£699.52**	0.52	0.22%	**£86.22**
639646	St James' Ce First School & Nursery (Alderholt)	0.10	40.23	3.61%	11.57	4.77%	51.80	£1,505.54	£538.17	**£2,043.71**	5.18	2.19%	**£863.85**
537793	St John's (Weymouth)	0.28	20.10	1.80%	2.07	0.85%	22.17	£752.15	£96.16	**£848.31**	6.21	2.62%	**£1,035.07**

Page 69

Early Years School Based Nursery Grant distribution

		Data for grant calculations						Teachers' Pay Grant 2026-27			Free School Meals Expansion Grant 2026-27		
A	B	C	D	E	F	G	H	I	J	L	M	N	O
DFE No.	Setting Name	APT FSM proportion	Age 3&4 PTE	% of total Age 3&4 PTE	Age 2 PTE	% of total Age 2 PTE	Total PTE	TPAG Age 3&4	TPAG Age 2	**TPAG Total**	APT FSM proportion x PTE	% of grant	**FSM Expansion Grant Total**
537823	St Mary The Virgin Nursery (Shooting Stars)	0.13	45.45	4.08%	10.30	4.25%	55.75	£1,700.75	£479.24	**£2,179.99**	7.25	3.06%	**£1,208.65**
639591	St Mary's Ce First School Nursery (West Moors)	0.17	23.47	2.11%	2.80	1.16%	26.27	£878.13	£130.28	**£1,008.41**	4.47	1.88%	**£744.67**
513057	St Marys Dorchester Haycorns	0.16	28.80	2.59%	1.20	0.50%	30.00	£1,077.70	£55.83	**£1,133.53**	4.80	2.02%	**£800.48**
639498	St Mary's Explorers - Marnhull	0.15	10.93	0.98%	0.00	0.00%	10.93	£409.13	£0.00	**£409.13**	1.64	0.69%	**£273.50**
639745	St Michael's School Nursery	0.33	1.00	0.09%	0.00	0.00%	1.00	£37.42	£0.00	**£37.42**	0.33	0.14%	**£55.03**
517787	Swanage Primary School Cygnets Preschool	0.15	12.02	1.08%	7.63	3.15%	19.65	£449.67	£355.16	**£804.83**	2.95	1.24%	**£491.55**
516004	The Mulberry Bush Pre-School (St Andrews Weymouth)	0.23	18.20	1.63%	2.80	1.16%	21.00	£681.05	£130.28	**£811.33**	4.83	2.04%	**£805.49**
519782	Thorner's Fledglings Pre-School	0.14	20.12	1.81%	0.67	0.28%	20.78	£752.77	£31.02	**£783.79**	2.91	1.23%	**£485.24**
537920	Three Legged Cross Nursery School	0.16	10.07	0.90%	1.80	0.74%	11.87	£376.70	£83.75	**£460.45**	1.90	0.80%	**£316.64**
639614	Verwood CE First School and Nursery	0.10	27.90	2.50%	0.00	0.00%	27.90	£1,044.03	£0.00	**£1,044.03**	2.79	1.18%	**£465.28**
639533	Wimborne St Giles Ce Va First School Foundation Unit	0.10	7.13	0.64%	0.00	0.00%	7.13	£266.93	£0.00	**£266.93**	0.71	0.30%	**£118.96**
537832	Winterbourne Valley After School Club	0.12	14.20	1.27%	0.00	0.00%	14.20	£531.37	£0.00	**£531.37**	1.70	0.72%	**£284.17**
639730	Wool Ce Primary School And Pre-School	0.17	18.65	1.67%	5.23	2.16%	23.88	£697.89	£243.50	**£941.39**	4.06	1.71%	**£677.10**
530628	Wyke Regis Infant School Nursery	0.24	43.80	3.93%	0.00	0.00%	43.80	£1,639.01	£0.00	**£1,639.01**	10.51	4.43%	**£1,753.06**
			1114.10	100.00%	242.24	100.00%	1356.34	£41,690.00	£11,271.00	**£52,961.00**	237.06		**£39,534.00**

Dorset Schools' Forum

Date of Meeting:	**6 November 2026**
Report Title:	**Dedicated Schools' Grant (DSG) Monitoring 2026/27 (Q2)**
Executive Director:	**Paul Dempsey, Executive Director for People - Children**
Corporate Director:	**Jen Furnell** **Corporate Director Education and Learning**
Report Author: Title: Tel: Email:	Lee House Service Manager - Finance 01305 225032 Lee.house@dorsetcouncil.gov.uk
Presenting Officer:	**As above**
Report Status:	**Public**
Reason for Submission to Schools' Forum:	**For INFORMATION** **Under Forum power/responsibility**: ___ 4 (a) (i) acting as the conduit for information relating to Children's Services budgets, and particularly schools' and early years' funding, for relevant colleagues in schools and early years settings, to ensure the work of the Schools' Forum becomes a central part of the local education context.
Recommendation(s):	• To note the DSG Q2 2026/27 position
Reason for Recommendation(s):	To inform School's Forum of the latest DSG position and the reasons for the position.
DECLARATIONS OF INTEREST	**Schools' Forum members are reminded of their responsibility to make a declaration of interest in any agenda item in which they have an**

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

1. **Executive Summary**

    - Dorset's DSG is forecast to overspend by £74.3m in 2026/27, driven primarily by High Needs Block expenditure.
    - The principal pressure remains growth in demand for SEND provision and specialist placements and the number of Children and Young People (CYP) who need an EHCP.
    - Dorset's SEND Reform Plan was approved in October 2026 and a £145.0m High Needs Stability Grant is expected in November 2026.
    - After receipt of the grant, the cumulative DSG deficit is forecast to reduce to £76.7m at 31 March 2027 but will return to ~£150m by 31 March 2028.

2. This report covers:

    1. The Dedicated Schools Grant context, including the statutory override
    2. The financial position of Dorset's DSG at September 2026
    3. Individual Schools Budget (ISB)
    4. Early Years and Central School Services blocks

3. <u>Context</u>

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

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

6. As of 31 March 2026, cumulative DSG deficit is £148.7m. 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.

7. Dorset's SEND Reform plan was accepted in October 2026 with a High Needs Stability Grant totalling £145m due November 2026. This would leave a balance of £3.7m to be funded from the reserve setup to support the Safety Valve programme before the programme was cancelled. This reserve would also be used in the event government do not fully fund any future year DSG cumulative deficit write offs.

8. The long-term SEND reforms have yet to be finalised with the government stating:

    For deficits that arise in 2026–27 and 2027–28, local authorities can expect that we will continue to take an appropriate and proportionate approach, though it will not be unlimited.

Future support will take into account LAs' successful delivery of their approved Local SEND reform plan, including appropriate use of investment funding to establish an Experts at Hand offer.

9. Any reforms will take time to implement and materials from the DfE so far suggest staged implementation of the changes.

10. Dorset's DSG deficit is forecast to be approximately £150m by 31 March 2028.

11. The current and future cumulative DSG deficit remains a major risk for the authority:

    "Instability in the High Needs Block budget may create an increased deficit in the Dedicated Schools Grant (DSG), resulting in a worsening of Dorset Council's financial position." Risk ID 194

12. Whilst the deficit is therefore held separately from the General Fund, there is a cashflow pressure resulting from carrying a £148.7m deficit meaning that the Council has access to £148.7m less cash than it would otherwise, with a cost of circa £6m in interest foregone. This will be mitigated through the receipt of the High Needs Stability Grant; however, this will return during the later stages of 2026/27 and 2027/28.

13. <u>DSG Quarter 2 position</u>

14. At the 30 September 2026, the forecast outturn is a £74.315m overspend for 2026/27 (Appendix B). In October 2026 Dorset's SEND reform plan was accepted with a High Needs Stability Grant totalling £145m due in November 2026, making the revised cumulative deficit figure at March 2027 a total of £76.719m (Appendix A)

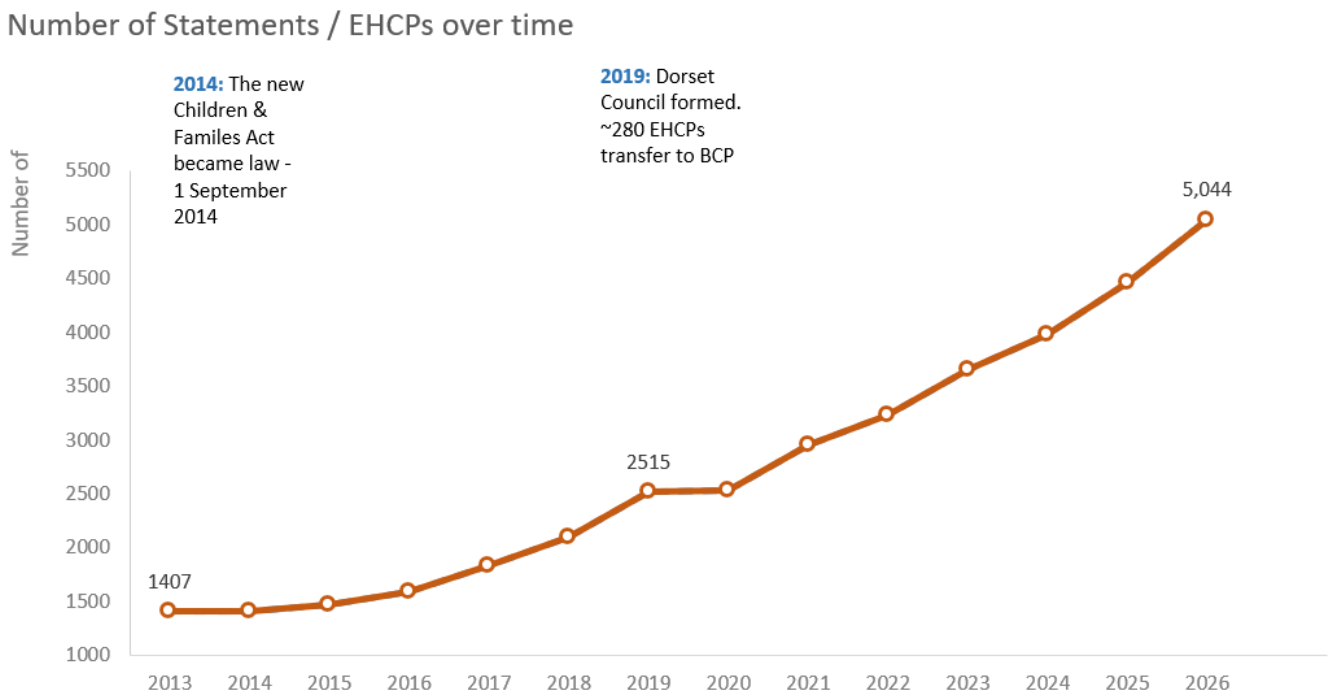
15. The outturn position for 2025/26 was a £54.45m overspend.

16. The forecast overspend is currently within the High Needs Block.

17. Appendix A provides the forecast cumulative DSG position and Appendix B provides a summary of the forecast in-year variance position. Appendix G is a variance analysis on select High Needs Block budgets.

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

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



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

21. The DSG budget for financial year 26/27 was set with a starting in-year deficit of £73.328m. The forecast deficit has increased from £73.737m at Quarter 1 to £74.315m at Quarter 2, an adverse movement of £0.578m. This is primarily due to increases in independent special school placement costs.

22. There has been an increase in Independent Special School Placements, with current forecasts indicating 342 FTE at an average cost of £68,743. This compares to the budgeted 330 FTE at £66,680. The higher volume of placements and increase in average cost is contributing to a projected overspend on Independent Special School Placements of £1.48m.

23. However, there has been a reduction in forecast for Specialist Post 16 of £0.647m which equates to approximately 11 FTEs bringing the number to 144 FTEs compared to the budgeted number of 155 FTEs and a further reduction in ISP LAC of £0.467m which is a reduction of approximately 3 FTEs compared with the budgeted number of 20 FTEs.

24. The new EHCP case management system, Synergy Case Management, was implemented on 7 May 2025. Since implementation, work has continued to cleanse data and enhance reporting functionality, resulting in a temporary reduction in the availability of management information. As a result, validated EHCP data for the period to the end of September is not currently available.

25. During Autumn Term 1, Dorset Council has been working closely with its software provider to develop a new suite of bespoke reporting tools. These reports will provide enhanced analysis of EHCP cohorts, educational pathways and outcomes, supporting a more comprehensive understanding of demand, need and provision across the SEND system. To enable these improvements, a number of existing reports have been temporarily withdrawn while they are redesigned and updated. The revised reporting suite is expected to be available during Autumn Term 2, at which point more detailed EHCP analysis will resume and a refreshed EHCP analysis will be included in future Schools Forum reports.

26. Individual Schools Budget (ISB Forecast

27. An update will be provided as part of the Q3 report, once the autumn term forecast of outturn returns from schools have been received.

28. Early Years Block

29. The Early Years Block entitlements are:

- The 15 hours entitlement for eligible working parents of children from 9 months up to 2 years old (was extended to 30 hours from 1 September 2025

- the 15 hours entitlement for eligible working parents of 2-year-old children (was extended to 30 hours from 1 September 2025)

- the 15 hours entitlement for families of 2-year-olds receiving additional support (formerly known as the 2-year-old disadvantaged entitlement)

- the universal 15 hours entitlement for all 3 and 4-year-olds

- the additional 15 hours entitlement for working parents of 3 and 4-year-olds

30. The sudden and unexpected closure of a large early years setting in West Dorset may put some pressure on the EYB, if funding paid for the second half of the autumn term cannot be recovered. All steps will be taken to recover the funds and any double funding should be covered by the £315k contingency budget. Otherwise, no issues have been identified and the EYB is on track to keep within budget.

31. Central Schools Services Block and Year End Underspends

32. Part of the Central School Services Block funding allocation is based on historic commitments. The DfE remove part of this commitment for authorities to apply for this to be returned. Dorset Council have been successful in this application, resulting in a return of £76k, amending the historic commitment funding to £384k. This is due to premature retirement costs continuing to be greater than the historic commitment funding received.

33. The Central Services Schools Block (CSSB) is currently forecasting an underspend of £0.028m.

34. Block underspends should not be seen as separate to the 'high needs deficit' as all the four DSG blocks are taken together, as announced by the government in 2026:

'This has the effect that local authority cannot carry forward positive balances on the other non-High Needs DSG blocks if the whole DSG account is in deficit at the end of the year.' Explanatory note on the government's approach Dedicated Schools Grant deficits

1. Well-being and Health implications

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

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

2. Climate Implications

None

3. Other implications

None

4. Risk Assessment

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

Current Risk: High
Residual Risk: Medium

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

5. Equalities Impact Assessment (EqIA)

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

6. Appendices

Appendix A: Total Dorset DSG forecast variance

Appendix B: Dorset's Cumulative DSG Position

Appendix F: Forecast DSG spend 2026/27

Appendix G: Variance Analysis: Select High Needs Block budgets

7. Background Papers

Explanatory note on the government's approach Dedicated Schools Grant deficits - 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 - Sept 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	
2026-27 DSG In-year forecast overspend		74,315,519		
DSG Cumulative Deficit (31 March 2027)			223,084,018	
Schools Block transfer 2026-27 (returned via HNB funding)	-	1,348,041		
Revised DSG Deficit			**221,735,977**	
DfE HNB Stability Grant due 30 November 2026	-	145,016,732		
Forecast closing DSG cumulative deficit (31 March 2027)				**76,719,245**

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Appendix B

Total Dorset DSG forecast variance - September 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	-527				**-527**
School Admissions		30,266			**30,266**
Schools Forum		2,291			**2,291**
Miscellaneous (not more than 1% of Schools Budget)		0			**0**
Licences		-3,718			**-4,245**
PRC ongoing		0			**0**
Dorset SACRE		0			**0**
Central services to all schools		0			**0**
HNB - overspend identified at budget setting			-73,328,955		**-73,328,955**
HNB - Places			0		**0**
HNB - Placements and Direct Payments			-224,994		**-224,994**
HNB - top up payments			-587,834		**-587,834**
HNB - Bespoke packages			-225,149		**-225,149**
HNB - NHS support			-7,939		**-7,939**
HNB - Contracts and development			0		**0**
HNB - hearing and vision support service			0		**0**
HNB - specialist teaching			20,676		**20,676**
HNB - physical and medical service			0		**0**

HNB - portage			10,365		**10,365**
HNB - complex communications			0		**0**
HNB - other			0		**0**
HNB -Grant			0		**0**
					0
					0
Early Years - centrally retained services				0	**0**
Early Years - provider budgets 3&4 year olds				0	**0**
Early Years - provider budgets 2 year olds (FRAS)				0	**0**
Early Years - provider budgets 2 year olds (working Families)				0	**0**
Early Years - provider budgets under 2's (working families)				0	**0**
Early Years - Pupil Premium				0	**0**
Early Years - Disability Access Fund				0	**0**
Early Years - Early SEND support				0	**0**
Early Years - Exceptional circumstances				0	**0**
Early Years - Contingency				0	**0**
	-527	28,839	-74,343,831	0	-74,315,519

Appendix F

Total Dorset DSG forecast spend - September 2026

	Schools Block	Central School Services Block (CSSB)	High Needs Block	Early Years Block	**TOTAL FORECAST**
	£	£	£	£	**£**
Individual Schools budgets	76,804,075				**76,804,075**
Growth fund	188,195				**188,195**
De-delegated budgets	210,133				**210,133**
School Admissions		444,734			**444,734**
Schools Forum		50,909			**50,909**
Miscellaneous (not more than 1% of Schools Budget)		51,600			**51,600**
Licences		362,718			**362,718**
PRC ongoing		525,400			**525,400**
Dorset SACRE		6,000			**6,000**
Central services to all schools		775,704			**775,704**
					0
HNB - Places			20,378,764		**20,378,764**
HNB - Placements and Direct Payments			36,527,111		**36,527,111**
HNB - top up payments			54,814,475		**54,814,475**
HNB - Bespoke packages			12,182,441		**12,182,441**
HNB - NHS support			159,184		**159,184**
HNB - Contracts and development			1,729,547		**1,729,547**
HNB - hearing and vision support service			931,622		**931,622**
HNB - specialist teaching			910,414		**910,414**
HNB - physical and medical service			101,640		**101,640**
HNB - portage			619,655		**619,655**
HNB - complex communications			0		**0**
HNB - other			5,261,496		**5,261,496**
HNB - Grant			0		**0**
Early Years - centrally retained services				1,211,845	**1,211,845**
Early Years - provider budgets 3&4 year olds				19,310,374	**19,310,374**
Early Years - provider budgets 2 year olds (FRAS)				1,907,837	**1,907,837**
Early Years - provider budgets 2 year olds (working Families)				11,983,895	**11,983,895**
Early Years - provider budgets under 2's (working families)				14,745,910	**14,745,910**
Early Years - Pupil Premium				431,484	**431,484**
Early Years - Disability Access Fund				250,575	**250,575**
Early Years - Early SEND support				300,000	**300,000**
Early Years - Exceptional circumstances				80,000	**80,000**
Early Years - Contingency				333,990	**333,990**
	77,202,403	2,217,065	133,616,350	50,555,910	**263,591,728**
			-74,343,831		

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Appendix G

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**	**P6**	**FTE Unit Cost (£)**	**Variance in numbers**	**Variance in Cost (£)**	**Volume Variance (£)**	**Price Variance (£)**	Check	**Notes**
	5,399											
Mainstream Funding												
Top up: Banding	1,690	12,594,210	7,452	1,690	12,594,210	7,452	-	-	-	-	-	
Top up: Exceptional	1	2,672,660	2,672,660	1	2,672,660	2,672,660	-	-	-	-	-	
Targeted SEND, Costed & Specialist Provision	339	6,994,838	20,634	340	6,994,838	20,573	(1)	-	-	-		
OLA Top up: Banding or equivalent	89	696,359	7,824	89	696,359	7,824	-	-	-	-	-	
Resourced Provision Funding												
Resourced Provision place funding:	162	1,192,167	7,355	162	1,192,167	7,355	(0)	-	(2,663)	(47)	(2,709)	
Resourced Provision top up funding:	252	3,588,696	14,241	252	3,588,696	14,241	-	-	-	-	-	
Independent Special School Placements	330	22,004,903	66,682	342	23,487,339	68,743	(12)	(1,482,436)	(777,953)	(704,483)	-	
CiC Education Placements	20	2,966,565	148,328	17	2,499,169	146,837	3	467,396	442,018	25,378	-	
Specialist Post 16 Institution Placements	155	9,363,066	60,407	144	8,716,062	60,388	11	647,004	644,342	2,662	-	
Independent school Placements	23	511,459	22,237	21	511,459	24,046	2	-	38,471	(38,471)	-	
Special Schools												
Special School place funding:	989	9,896,666	10,007	989	9,896,666	10,007	-	-	-	-		
Special School top up funding:	1,015	17,895,431	17,631	1,015	17,895,431	17,631	-	-	-	-		Original budget adjusted by Import/Export ac
Special School exceptional top up funding:	1	187,097	-	1	187,097	-	-	-	-	-		
Other Local Authority Special School funding:	105	2,394,649	22,806	105	2,394,649	22,806	-	-	-	-	-	
Coombe House Placements	**146**	**8,631,931**	**59,123**	**146**	**8,631,931**	**59,123**	**-**	**-**	**-**	**-**	**-**	
Further Education Placements and top up	**962**	**5,652,547**	**5,876**	**962**	**5,652,547**	**5,876**	**-**	**-**	**-**	**-**	**-**	Includes a recoupment adjustment
											-	
Learning Centre / AP	**361**	**9,941,635**	**27,539**	**361**	**9,941,635**	**27,539**					-	Includes a recoupment adjustment
Learning Centre place funding:	361	3,583,333	-	361	3,583,333		-	-	-	-	-	
Learning Centre top up funding:	221	6,358,302	-	221	6,358,302		-	-	-	-	-	
Other AP	-	-	-	-	-	-	-	-	-	-	-	
											-	
Other		14,997,303			**15,301,899**		-	(304,596)	-	-	304,596	Contracts, positions, funding to schools that
Pre-School Groups		867,967			**867,967**		-	-	-	-	-	
HNB Grants		5,176,238			**5,176,238**		-	-	-	-	-	
SEN Support Service Trading		-					-	-	-	-		
Enhanced Health contributions		-					-	-	-	-		
Recharges		-			-		-	-	-	-		
Total HNB Cost		138,226,387			138,899,019			(672,632)				
Actual Funding received - HNB after deductions		(64,897,431)			(64,555,187)			(342,244)				
Deficit/(Surplus)		**73,328,956**			**74,343,832**			**(1,014,876)**				

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