**Schools' Forum**
26 September 2025
Agenda Item: 1

# Minutes of Dorset Schools' Forum Meeting
# 4th July 2025

## Attendance Record

| *Sector* | *Name* | *Role and Establishment* | 27-Sep | 8-Nov | 17-Jan | 28-Mar | 4-Jul |
|---|---|---|---|---|---|---|---|
| | | ***SCHOOLS' MEMBERS (voting)*** | | | | | |
| Secondary Maintained | Phil Jones (Chair) | Head Teacher<br>Ferndown Upper School | P | P | P | P | P |
| | Keith Hales (Vice Chair) | Head Teacher<br>Beaminster School | P | P | P | P | P |
| | Luana Girling | Governor<br>Lytchett Minster School | P | P | P | P | P |
| Primary Maintained | Simon Smith | Head Teacher<br>Parrett & Axe CE VA Primary School | P | P | P | P | A |
| | Andrew Johnson | Head Teacher<br>Conifers Primary School | - | - | A | - | - |
| | Andrew Boggis | Governor<br>Salway Ash Primary School | - | P | P | P | A |
| | Peter Marsden | Chair of Governors<br>Bincombe Valley Primary School | P | - | - | - | - |
| Special Maintained | Clive Padgett | Head Teacher<br>Yewstock School & College | A | P | P | P | P |
| Learning Centre Maintained | David Dinsmore | Head Teacher<br>Dorchester Learning Centre | P | P | P | P | A |
| Secondary Academy | Brian Boyes | Director of Secondary Education<br>Initio Learning Trust | - | A | A | P | A |
| | Nick Rutherford | Head Teacher<br>Thomas Hardye School, Wessex Multi-Academy Trust | P | P | P | A | A |
| | Caroline Spearing | Governor<br>Sturminster Newton High School, SAST | P | A | P | P | A |
| | Vacancy | | - | - | - | - | - |
| | Vacancy | | - | - | - | - | - |
| Primary Academy | Ross Bowell | Director of Resources<br>Initio Learning Trust (notionally St John's CE First School) | P | - | - | - | - |
| | Adam Gough | Head Teacher<br>Burton Bradstock CE Primary School, Initio Learning Trust | P | P | P | A | P |
| | Giles Pugh | Trustee<br>Diocese of Salisbury Academy Trust | A | A | P | A | P |
| | Debbie Shutts | Chief Financial Officer<br>Wessex Multi-Academy Trust | P | P | P | P | P |
| | Vacancy | | - | - | - | - | |
| Special Academy | Katherine Seymour | Head Teacher<br>Wyvern Academy | P | P | P | A | P |
| Learning Centre Academy | Kelly Knight | Head Teacher<br>Harbour Vale School, Sherborne Area Schools Trust | P | P | P | P | P |
| Early years | Debbie Appleby | Nursery Director<br>Orchard Day Nursery | P | A | P | A | - |
| | Lorraine Clark | Proprietor<br>Hopscotch Pre-school | P | P | P | P | P |
| Post-16 | Rob Cole | Vice Principal – Finance and HR<br>Weymouth College | P | A | - | - | - |
| | Nicky Porter | Assistant Principal<br>Kingston Maurward College | A | A | A | A | A |
| Trade Unions | Jessica Powell | Schools Convenor, Unison Dorset Branch<br>Dorset Teachers' & Support Staff Council | P | A | A | A | - |

| ***Key*** | | |
|---|---|---|
| | P | Present |
| | A | Apologies |
| | - | Absent without apologies (members) or not due to attend (officers/observers) |
| | n/a | Not applicable e.g., not a member at that time |

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| ***Sector*** | ***Name*** | ***Role and Establishment*** | 27-Sep | 8-Nov | 17-Jan | 28-Mar | 4-Jul |
|---|---|---|---|---|---|---|---|
| | | ***NAMED OBSERVERS*** | | | | | |
| Maintained Learning Centres | Kieren Hasler | Governor<br>Forum Centre | P | A | A | A | A |
| Maintained Special Schools | Bruce Bonwell | Governor<br>Westfield Arts College | A | A | A | P | P |
| Local Authority | Clare Sutton | Portfolio Holder for Children’s Services, Education & Skills, Dorset Council Cabinet | P | P | A | P | P |
| Church Schools | Giles Pugh | Deputy CEO<br>Salisbury Diocesan Board of Education | A | A | P | A | P |
| Local Authority | Bridget Bolwell | Elected Member, Dorset Council Cabinet | P | P | A | P | P |
| Maintained Special Schools | Karen Caile | Finance and Business Manager<br>Mountjoy School | - | P | - | P | P |
| | | ***OBSERVERS in attendance*** | | | | | |
| Local Authority | Kerrie Courtaux | Finance Officer, School & Early Years Funding Team, Education Services, People – Children Directorate | P | P | P | P | P |
| Maintained Learning Centres | Lisa Cracknell | School Business Leader, Compass | - | - | - | P | P |
| Local Authority | Lucy Cropp | Finance Officer, School & Early Years Funding Team, Education Services, People – Children Directorate | - | - | P | P | - |
| Local Authority | Catherine Dunkley-Jones | Governor Services Officer, Schools, Finance & Support, People – Children Directorate | P | - | - | - | - |
| Local Authority | Paul Kimber | Elected Member, Dorset Council Cabinet | - | - | P | - | - |
| Local Authority | Vikki Murphy | SAFSO, Schools Finance & Support, Education Services, People – Children Directorate | P | P | P | P | P |
| Local Authority | Tracy Privett | Finance Officer, School & Early Years Funding Team, Education Services, People – Children Directorate | - | - | P | P | - |
| Maintained Special Schools | Vicky Reed | HR Manager and PA to Head Teacher, Mountjoy School | - | - | - | P | - |
| Local Authority | Ruth Sivarajah | Education Challenge Lead, Dorchester & West Locality, Learning & Belonging, People – Children Directorate | - | - | P | - | - |
| Local Authority | Jane Somper | Elected Member, Dorset Council Cabinet | P | - | A | P | - |
| Secondary Maintained | Niamh Vercoe | School Business & Finance Manager, The Woodroffe School | - | - | P | - | - |
| | | ***OFFICERS in attendance*** | | | | | |
| Local Authority | Hannah Chapple | Senior Accountant - Finance, Finance & Commercial Directorate | - | A | P | P | P |
| Local Authority | Sean Cremer | Corporate Director, Finance & Commercial Directorate | P | - | - | P | - |
| Local Authority | Liz Curtis-Jones | Principal Lead for Best Start in Life, Strategic Commissioning, People – Children Directorate | P | P | P | - | - |
| Local Authority | Amanda Davis | Corporate Director for Education & Learning, People – Children Directorate | P | P | P | - | - |
| Local Authority | Ed Denham | School Place Sufficiency Manager, Education Services, People - Children Directorate | - | - | - | P | - |
| Local Authority | Paul Dempsey | Executive Director of Children’s Services | - | P | - | - | P |
| Local Authority | Ellen Eager | Accountant, Schools, Finance and Support Team, Education and Learning, People – Children Directorate | P | P | P | P | [ |
| Local Authority | Tom Easterbrook (Clerk) | Schools' Forum Officer, Schools, Finance & Support, Education Services, People – Children Directorate | P | P | P | P | P |
| Local Authority | Vanessa Eddey | Team Manager, Schools, Finance & Support, Education Services, People – Children Directorate | A | P | P | P | P |
| Local Authority | Lisa Gray | Education Challenge Lead, Chesil Locality | - | - | - | P | P |
| Local Authority | Lee House | Service Manager - Finance, Finance & Commercial Directorate | P | P | A | P | P |
| Local Authority | Richard Howes | Education Challenge Lead, Chesil Locality | - | P | - | - | - |
| Local Authority | Heather Lappin | Head of Strategic Finance, Finance & Commercial Directorate | - | P | P | - | - |
| Local Authority | Margaret Judd | Manager (HNB Finance), Education & Learning, People – Children Directorate | P | P | P | P | P |
| Local Authority | Kim Saint | Project Manager, Strategic Commissioning | - | A | - | - | P |
| Local Authority | Louise Taylor | Relationship Manager, Education & Learning | - | P | - | - | - |
| Local Authority | Claire Webb | Strategic Commissioner, Sufficiency & Education | P | P | - | - | |
| Local Authority | Beth Whittaker | Principal Lead, Best Education for All, Education & Learning | P | P | P | P | A |

**ACTION**

## 1. Apologies, membership issues & current vacancies

***1.1*** Apologies were received from:

Brian Boyes
Beth Whittaker
Simon Smith
Caroline Spearing
Nick Rutherford
Nicky Porter

***1.2*** **Membership issues**

***1.3*** **Draft minutes of the meeting on 28th March 2025**

***1.3.1*** The draft minutes of the meeting held on 28th March 2025 were reviewed and approved.

***1.4*** **Matters Arising**

None

***1.5*** **Declarations of Interest**

None

***1.6*** ***Correspondence***

The Chair noted that correspondence had been received regarding SEND funding mechanisms. This had been discussed with officers, and a response is being coordinated.to bring a paper to a future meeting, and the item will be added to the forward plan.

***1.7*** ***The Schools Forum Action log***

***1.7.1*** **A number of actions were rolled over. The action log is attached overleaf with dates set for the next meeting**

## 2. WORK OF THE SCHOOLS FORUM 25/26

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

***2.2*** Key points of discussion

***2.2.1*** Forum noted the updated membership following recent elections and appointments. It was highlighted that the Primary Maintained sector election had been contested for the first time since 2019, with four candidates standing. Members welcomed the level of engagement and interest shown.

***2.2.2*** The following members were confirmed as elected or reappointed:

- Barbara Southcott (Primary Maintained Governor)
- Kieran Hasler (Learning Centre Maintained Governor Named Observer)
- Paul Lavis (Primary Academy)
- Dani Mark (Early Years)
- Bruce Bonwell (Maintained Special School Governor Named Observer)
- Lorraine Clark (Early Years)
- Luana Girling (Secondary Maintained Governor)

***2.2.3*** Efforts are ongoing to fill remaining vacancies, particularly in the academy sectors, and engagement with trust leaders is continuing.

***2.2.4*** The forward plan for 2025/26 was reviewed and agreed.

***2.2.5*** The proposed meeting dates and formats were also confirmed

**3. TRADE UNION FACILITIES**

**ACTION**

***3.1*** To consider a report from Vanessa Eddey, Team Manager – Schools, Finance & Support and Chris Matthews, Head of Human Resources, Corporate Development Directorate

For Information

***3.2*** Key points of discussion

***3.2.1*** The paper was brought following questions raised at the March meeting. Officers explained that the purpose of this paper was to take a step back and clarify the legal responsibilities of schools and academies as employers in relation to trade union facilities time, and to provide an overview of the current arrangements. It was noted that this discussion was not about funding levels or de-delegation decisions, which would be addressed in a future meeting.

***3.2.2*** Officers outlined the statutory obligations on schools to provide facilities time for union representatives. It was explained that the current model — which includes full-time secondment for a representative covering non-teaching unions — is designed to be a more efficient and equitable way of meeting these obligations across all schools.

***3.2.3*** Members acknowledged the efficiency of the current model but raised concerns about the perception that schools are effectively funding a full-time union officer. Some members felt that this blurred the line between employer obligations and union responsibilities.

***3.2.4*** It was noted that the current arrangement allows for timely and consistent support to school staff, which would be difficult to replicate if each school were required to release their own representative. Members recognised the value of having well-trained, experienced union officers available to support staff across the county.

***3.2.5*** However, several members expressed concern about the financial impact on individual schools, particularly where reimbursement rates do not fully cover the cost of release. One member highlighted a shortfall of approximately £6,000 in their trust's support staff budget and noted that a proposed increase in teaching union release time would result in a further funding gap.

***3.2.6*** Members queried the basis for reimbursement rates, and whether they accurately reflect the actual costs incurred by schools. Officers confirmed that this issue would be reviewed in the autumn term as part of the wider consultation on de-delegation.

***3.2.7*** There was discussion around the length of secondment for union representatives. Members questioned the appropriateness of long-term secondments — in some cases extending over several years — and raised concerns about the implications for job evaluation, pay parity, and redundancy risk if a representative were to return to a lower-graded substantive post.

***3.2.8*** Officers acknowledged that a previous agreement had resulted in a representative being paid at a higher grade than their substantive role. It was confirmed that there is no clear audit trail for how this arrangement was agreed, and that this has contributed to the current funding pressures.

**ACTION**

***3.2.9*** Members suggested that future secondments should be time-limited, with clearer expectations around duration, pay, and return-to-role arrangements. It was also suggested that unions should contribute more directly to the cost of full-time release, particularly where the representative is no longer undertaking duties within a school setting.

***3.2.10*** A union officer in attendance as an observer was invited to speak and shared their perspective on the challenges of balancing union duties with teaching responsibilities. They emphasised the importance of having sufficient release time to provide effective support and noted that financial pressures on schools are making this increasingly difficult.

***3.2.11*** Officers confirmed that a full review of the scheme, including funding levels and reimbursement arrangements, will be brought to Forum in the autumn term.

***3.2.12*** Engagement will take place with schools currently hosting union representatives to understand the true cost of release and inform future proposals.

***3.2.13*** Members were encouraged to continue providing feedback to help shape a fair and sustainable model.

**4. <u>REVIEW OF SCHOOL IMPROVEMENT OFFER</u>**

***4.1*** To consider a report from and Lisa Gray, interim Principal Lead – Best Education for All, Education and Learning, People – Children Directorate
<u>For information</u>

***4.2*** <u>Key points of discussion</u>

***4.2.1*** The proposed School Improvement Service for next academic year has been shaped by feedback from schools, the new Ofsted focus areas, national priorities from the RISE team, Dorset's Education and Belonging Strategy, and reflections on the impact of the 2024/25 offer. A full impact report is due to be shared in September.

***4.2.2*** The offer is structured around three tiers of support: core, additional, and specific. It is differentiated for primary, middle, and secondary phases. Officers acknowledged that a bespoke offer for special schools is not yet in place but committed to consulting with those settings during the year ahead.

***4.2.3*** Key elements of the offer include:

- Continued support for headteacher appraisal, which has received positive feedback.
- Access to the PSHE Association membership, taken up by 41 of 48 maintained schools.
- Support for the DfE's Climate Ambassador programme.
- Introduction of an online single central record system to support safeguarding compliance.

***4.2.4*** Forum members welcomed the clarity and coherence of the offer, particularly its alignment with national and local priorities.

***4.2.5*** The response from secondary representatives was particularly positive. Members from this phase, who have previously expressed concerns about the relevance and impact of the local authority's school improvement work, praised the progress made over the past year. Members felt the 2024/25 offer was really strong and noted that it had provided equitable support for secondary schools, which had not always been the case in the past.

**ACTION**

***4.2.6*** Members also welcomed the strategic direction of the offer, with some indicating that they were now streamlining their external support in favour of the local authority's provision. This was seen as a significant shift and a reflection of growing confidence in the offer's quality and impact.

***4.2.7*** There was a query from members regarding the inclusion of statutory assessment support within the school improvement offer. Officers agreed to confirm the funding source and clarify this in future communications, particularly in the context of upcoming de-delegation discussions

## 5. CAPITAL FUNDING FOR MAINTAINED SCHOOLS UPDATE

***5.1*** To consider a report from Paul Scothern, Service Manager Capital Commissioning, Health Education & SEND Commissioning, People – Children Directorate
For Information

***5.2*** Key points of discussion

***5.2.1*** The paper provided an overview of capital expenditure on maintained non-VA schools during the 2024/25 financial year outlining the various budget streams used to support capital works, including:

- Strategic maintenance, with over £2 million spent across schools.
- School Access Initiative, totalling over £211,000, primarily for adaptations to support individual pupils in mainstream settings.
- Minor works, with £128,000 committed, largely focused on safeguarding improvements such as fencing.
- School Organisation Capital and Admissions (SOCA) projects, with over £7 million committed since January 2023. These include feasibility studies and early-stage projects that may lead to larger capital investments.

***5.2.2*** The paper also highlighted the significant investment in SEND capital projects, with £40 million committed by Dorset Council and a further £28 million received from the Department for Education. Of this, £10.6 million was allocated to named projects following a successful bid. The total SEND capital programme now stands at £68 million.

***5.2.3*** Forum members welcomed the scale and direction of the investment, noting that it aligns with the broader strategy to increase local provision and reduce reliance on independent placements. Members emphasised the importance of ensuring that capital spend reflects areas of greatest need, particularly in relation to high-cost placements and travel.

***5.2.4*** There was a specific focus on post-16 provision, where members noted a lack of visibility in the current capital programme. Officers confirmed that early conversations are underway with Weymouth College and Kingston Maurward College, which may lead to future capital projects or expanded provision. It was noted that one of the previously approved DfE-funded projects had included £2 million for post-16 provision at Weymouth College, though this may now be spread across both Weymouth and Kingston Maurward colleges following the merger earlier this year

***5.2.5*** Members also raised concerns about the condition and suitability of buildings in maintained special schools. It was noted that many of these settings are operating in facilities that are not fit for purpose for pupils with

**ACTION**

complex needs. Forum members stressed the need for a strategic capital plan that includes investment in sensory spaces, changing facilities, and outdoor access, to ensure that local provision remains viable and inclusive.

***5.2.6*** Officers confirmed that the SEND capital strategy is currently under review and will be aligned with the wider SEND sufficiency strategy. Members welcomed this and asked that the needs of special schools be clearly reflected in future planning.

***5.2.7*** Forum also discussed the use of School Condition Allocation (SCA) funding. Officers clarified that Dorset Council uses SCA to sustain the SOCA programme, while funding the strategic maintenance programme separately to the same level. This approach ensures that both streams are maintained without overlap.

## 6. DEDICATED SCHOOLS' GRANT (DSG): A: OUTTURN FOR 2024-25 B: INDIVIDUAL SCHOOLS' BUDGET (ISB) OUTTURN FOR 2024-25

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

***6.2*** Key points of discussion

***6.2.1*** The DSG outturn showed an overspend of £37.3 million, increasing the cumulative DSG deficit to £95.6 million. The High Needs Block continues to be the driver of the overspend, with a net pressure of £38.2 million, partially offset by underspends in other blocks.

***6.2.2*** Officers highlighted that the DSG deficit remains one of the most significant financial risks facing the local authority. While the statutory instrument allowing DSG deficits to be held outside of the council's reserves has been extended to March 2028, this was described as a temporary measure that does not resolve the underlying structural issues.

***6.2.3*** Forum noted that the Department for Education (DfE) has resumed Safety Valve discussions with Dorset Council. Unlike previous rounds, the current approach focuses on demonstrating that the authority is delivering best value in its use of High Needs funding, rather than simply achieving an in-year break-even position. Officers reported that a DfE advisor will visit Dorset in July to review progress and explore the authority's approach to managing demand and cost.

***6.2.4*** Members were reminded that Dorset's SEND services had recently received the highest possible rating in the ILACS inspection, and that the SEND Local Area Partnership inspection in 2024 had also been positive. Officers expressed cautious optimism that this would support constructive engagement with the DfE.

***6.2.5*** Forum discussed the continued growth in Education, Health and Care Plans (EHCPs), which have risen from approximately 1,400 in 2014 when they were converted from the original system of Statements of Special Educational Needs to over 4,400 today. Officers noted that this growth, combined with increasing complexity of need and rising placement costs, continues to place unsustainable pressure on the High Needs Block.

***6.2.6*** It was also noted that the average cost per placement had exceeded budgeted assumptions across all top-up bands, as shown in the appended

**ACTION**

data. Members acknowledged that both volume and price are contributing to the overspend.

***6.2.7*** Officers cautioned that the announcement of potential reforms to the SEND system may lead to a surge in EHCP requests, as families seek to secure support before any changes take effect.

***6.2.8*** Forum welcomed the update and noted the importance of continuing to invest in local provision and inclusive practice to reduce reliance on high-cost independent placements.

***6.2.9*** In relation to Individual Schools Budgets (ISBs), officers reported that overall school balances had increased to just over £8 million. This was attributed in part to cautious spending by schools in response to uncertainty around pay awards and future funding levels.

***6.2.10*** Forum discussed the importance of ensuring that funding is used to support pupils currently in school. Officers noted that some governing bodies are holding back on recruitment or investment due to concerns about future deficits, and encouraged schools to review contingency reserves regularly and align spending with school development priorities.

***6.2.11*** It was noted that while schools are required to plan over a three-year period, they should also be mindful of the principle that funding is for children in school today.

***6.2.12*** Forum also discussed the impact of falling rolls on school budgets. Officers acknowledged that pupil-led funding reductions can create significant challenges, particularly for smaller schools, and confirmed that the local authority continues to work with schools to manage these pressures.

***6.2.13*** A request was made for the next DSG outturn report to include a breakdown of the demographic profile of pupils in post-16 independent specialist provision, to support understanding of the nature of the overspend and inform future planning.

***6.2.14*** In related discussion, members noted that Westfield School had been required to reduce its post-16 cohort from 55 to 40 pupils in order to accommodate increasing demand from younger pupils with complex needs. This was cited as an example of the wider system pressures and the need for strategic investment in post-16 provision.

## 7. ANY OTHER BUSINESS

***7.1*** Key points of discussion

***7.1.1*** Forum took the opportunity to formally thank Margaret Judd, Sufficiency and Funding Manager, for her 24 years of dedicated service to Dorset Council and to Schools Forum. Members expressed their appreciation for her expertise, professionalism, and long-standing commitment to supporting inclusive education across the county.

***7.1.2*** Forum wished her well in her retirement and acknowledged the significant contribution she has made to the work of the Forum and to the wider education community in Dorset.

## 8. Dates, Times and Venues for Future Meetings

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

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

**ACTION**