

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

### ATTENDANCE RECORD

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

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

## 20. **Apologies for Absence**

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

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

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

## 21. **Start of Year Updates**

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

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

## 22. **Minutes and Actions from the Last Meeting**

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

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

Updates noted:

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

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

**23. Declarations of Interest**

**None**

**24. Correspondence**

**Chairs Letter to the Secretary of State**

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

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

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

**F40 Briefing Paper**

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

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

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

## **Letter from Cheselbourne Village School**

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

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

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

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

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

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

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

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

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

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

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

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

### **Voting Summary**

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

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

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

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

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

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

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

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

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

### **Voting Summary**

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

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

## **27. Mainstream Schools Funding Formula For 2026-27**

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

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

Officers confirmed that Dorset's proposed factor values continued to reflect the proportional increases set out in the NFF, but that affordability pressures meant that the NFF could not be delivered in full this year. Members also sought clarification on the

significantly higher factor value allocated to one secondary school; officers confirmed that this related to a PFI factor and was not discretionary funding.

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

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

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

### **Voting Summary**

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

## **28. Annual Review of the Arrangements for Early Years Provision**

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

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

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

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

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

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

## **29. Any other business**

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

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

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

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

No further items were raised.

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