

# Notice of Schools Forum



Date: Monday, 23 June 2025 at 10.00 am

Venue: Committee Room, First Floor, BCP Civic Centre Annex, St Stephen's Rd, Bournemouth BH2 6LL / Via MS Teams

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**Chairman:**

Geoff Cherrill                      Maintained Special

**Vice-Chairman:**

Patrick Earnshaw                Academies – Secondary

Kate Carter	Academies - Primary
Esther Curry	Academies - Primary
Chris Jackson	Academies - Primary
Chris Moody	Academies - Primary
Sean Preston	Academies - Primary
Heather Spring	Academies - Primary
Vacancy	Academies - Primary
Mark Avoth	Academies - Secondary
Paul Gray	Academies - Secondary
Michelle Dyer	Academies - Secondary
James Sankey	Academies - Secondary
Matthew Woodville	Academies - Secondary
Vacancy	Academies - Secondary
Sarah McCurrie	Special Academies
Ben Doyle	All Through Academies
Russell Arnold	Alternative Provision Academy
Chris Barnett	Maintained Secondary
Phillip Gavin	Mainstream PRU
Vicky Peters	Early Years
Linda Duly	Early Years
Vacancy	Catholic Diocese
Richard Wharton	C of E Diocese Representative

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All Members of the Schools Forum are summoned to attend this remote meeting to consider the items of business set out on the agenda below.

The press and public are welcome to attend this remote meeting and should email any request to do so to the meeting contact below, and a meeting invite will be sent.

<https://democracy.bcpCouncil.gov.uk/ieListDocuments.aspx?MIId=5773>

If you would like any further information on the items to be considered at the meeting please contact: Claire Johnston on 01202 096660 or email [democratic.services@bcpcouncil.gov.uk](mailto:democratic.services@bcpcouncil.gov.uk)

Press enquiries should be directed to the Press Office: Tel: 01202 118686 or email [press.office@bcpcouncil.gov.uk](mailto:press.office@bcpcouncil.gov.uk)

This notice and all the papers mentioned within it are available at [democracy.bcpCouncil.gov.uk](https://democracy.bcpCouncil.gov.uk)

GRAHAM FARRANT  
CHIEF EXECUTIVE

13 June 2025

**DEBATE**  
**NOT HATE**



Available online and  
on the Mod.gov app

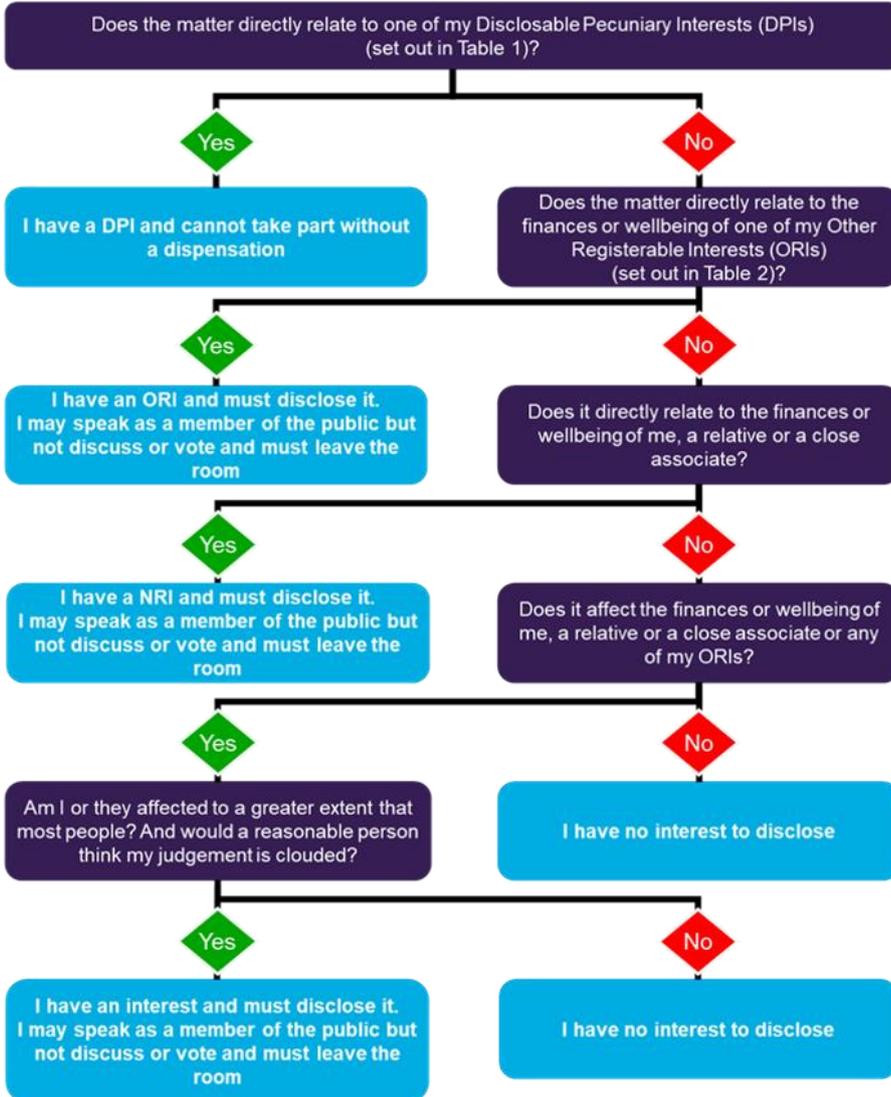


## Maintaining and promoting high standards of conduct

### Declaring interests at meetings

Familiarise yourself with the Councillor Code of Conduct which can be found in Part 6 of the Council's Constitution.

Before the meeting, read the agenda and reports to see if the matters to be discussed at the meeting concern your interests



What are the principles of bias and pre-determination and how do they affect my participation in the meeting?

Bias and predetermination are common law concepts. If they affect you, your participation in the meeting may call into question the decision arrived at on the item.

#### Bias Test

In all the circumstances, would it lead a fair minded and informed observer to conclude that there was a real possibility or a real danger that the decision maker was biased?

#### Predetermination Test

At the time of making the decision, did the decision maker have a closed mind?

If a councillor appears to be biased or to have predetermined their decision, they must NOT participate in the meeting.

For more information or advice please contact the Monitoring Officer  
(janie.berry@bcpcouncil.gov.uk)

### Selflessness

Councillors should act solely in terms of the public interest

### Integrity

Councillors must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships

### Objectivity

Councillors must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias

### Accountability

Councillors are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this

### Openness

Councillors should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing

### Honesty & Integrity

Councillors should act with honesty and integrity and should not place themselves in situations where their honesty and integrity may be questioned

### Leadership

Councillors should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs

# AGENDA

Items to be considered while the meeting is open to the public

**1. Apologies for Absence**

To receive any apologies for absence.

**2. Declarations of Interest**

Councillors are requested to declare any interests on items included in this agenda. Please refer to the workflow on the preceding page for guidance. Declarations received will be reported at the meeting.

**3. Minutes of the Previous Meeting**

To confirm the minutes of the previous meeting, held on 13 January 2025, as a correct record.

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## ITEMS OF BUSINESS

**4. Dedicated Schools Grant (DSG) Outturn 2024-25**

The report considers the end of year position for the DSG budget 2024-25. The budget was set with a funding gap of £28m, a similar level compared with the previous year, with the expectation that the innovation fund and other initiatives would start to have impact in reducing the demand for education health and care plans (EHCPs). This was alongside the creation of new SEND places in mainstream schools through capital investment to limit the use of higher cost independent provision.

The outturn is a net in-year funding gap approaching £50m. This is £5m more than indicated at quarter three. There is an element of one-off additional high needs spending over the final quarter, but it is likely most previously unforeseen costs will be on-going.

More children are remaining in mainstream schools but the growth in demand for EHCPs overall has more than offset any potential savings. The demand has continued to grow for independent school places, alternative provision, and bespoke arrangements for those unable to attend any school setting.

The trajectory of the accumulated deficit has therefore continued a significant upward path from £65.5m for March 2024, to £113.3m for March 2025.

13 - 18

**5. High Needs Update**

The report provides a summary of the high needs budget for 2025-26 and includes details of new activities to support pupils with additional needs in mainstream schools – the inclusion fund and outreach plus.

The inclusion fund is funded by surplus school block funding as agreed by Schools Forum in January 2025. The report sets out the how the fund will be allocated in 2025-26 following further consultation with headteachers since February this year.

Outreach plus is a new service to support mainstream schools establish resourced provision with the aim of increasing specialist capacity for children with autism spectrum condition and social, emotional and mental health needs.

Once fully implemented these two activities should deliver savings to the high needs budget through future cost avoidance.

19 - 26

**6. Schools Forum - Exceptional Circumstances Funding for 202526**

27 - 30

The report provides an update on:

- The Exceptional Circumstances Funding for 2025/26.
- The resolution of previously unpaid funding from Autumn 2023 to Spring 2025.

A revised criteria and funding model is now in place for 2025-26 that will be reviewed after 2 months to determine future frequency of calculation moving forwards.

Previously unpaid funding amounts have now been paid to all eligible schools on 30.05.25.

### **Items for Information**

- |   |         |
|---|---------|
| <b>7. Schools Forum Special School Banding Review</b>   | 31 - 44 |
| The report provides an update on progress made with the Special School Banding Review                                     |         |
| <b>8. Forward Plan</b>  | 45 - 46 |
| To consider and note the Forward Plan   |         |
| <b>9. Dates of Future Meetings</b>  |         |
| To note the future meeting dates as follows:  |         |
| - 29 September 2025   |         |
| - 24 November 2025  |         |
| - 19 January 2026   |         |
| - 22 June 2026  |         |
| <b>10. Any Other Business</b>   |         |
| To consider any other business, which, in the opinion of the Chairman, is of sufficient urgency to warrant consideration. |         |

No other items of business can be considered unless the Chairman decides the matter is urgent for reasons that must be specified and recorded in the Minutes.

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## SCHOOLS FORUM

MONDAY, 13TH JANUARY, 2025

**Present:** Geoff Cherrill (Maintained Special) – **Chairman**  
Patrick Earnshaw (Academies - Secondary) – **Vice-Chairman**

Kate Carter, TEACH Academies Trust, Academies - Primary  
Kate Curtis, Talbot Primary School, Academies - Primary  
Chris Moody, CFO - Delta Education Trust, Academies - Primary  
Heather Spring, Twynham Primary, Academies - Primary  
Mark Avoth, Bourne Academy - Principal, Academies - Secondary  
Michelle Dyer, Avonbourne Academies - Principal, Academies - Secondary  
Ben Doyle, Principal - St Peter's School, All Through Academies  
Russell Arnold, The Quay School - Headteacher, Alternative Provision Academy  
Phillip Gavin, Christchurch Learning Centre - Headteacher, Mainstream PRU  
Vicky Peters, Priory View Preschool, Early Years  
Linda Duly, Cuddles Day Nursery, Early Years  
Richard Wharton, C of E Diocese Representative

**Also in Attendance:** Councillor R Burton, Portfolio Holder for Children's and Young People  
Councillor S Carr-Brown, Chair, Children's Services O&S Committee

**Officers in attendance:** Cathi Hadley, Corporate Director Children's Services  
Chris Lee, Interim Head of School Inclusion  
Sharon Muldron, Interim Director of Education and Skills  
Tanya Smith, Head of School Planning and Admissions  
Nicola Webb, Assistant Chief Finance Officer  
Steve Ellis, Management Accountant - Education  
Jeanette Yorke, Early Years Operational Manager

### 21 **Apologies for Absence**

Apologies were received from Chris Barnett and Sean Preston.

### 22 **Declarations of Interest**

None

### 23 **Minutes of the Previous Meeting**

The minutes of the meeting held on 18 November were approved as a correct record.

### 24 **DSG Financial Settlement 2025-26**

The Assistant Chief Finance Officer presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'A' to these Minutes in the Minute

Book. The Forum was advised that the schools and early years blocks were considered in separate papers on the meeting agenda. The DSG Settlement for 2025-26 was received on 18 December 2024. It included:

- Indicative allocations for the early years block, with the 47% increase of £17m to £53.5m reflecting the phased expansions of the free childcare entitlements for working parents and increase in hourly funding rates.
- Final allocations for the school's block based on the October 2024 schools census, with the increase of 1.7% to £280.7m through the schools NFF reflecting higher factor unit values and an increase in pupil characteristic data partially offset by a net reduction in pupil roll.
- Final allocations for the central school services block of £2.2m, providing an increase of 3.5% for on-going functions, including for the national insurance increase from April 2025.
- Indicative allocations for the high needs block are for an increase of £3.8m (6.2%) to £64.5m.

A draft DSG budget for 2025-26 was provided with in an Appendix to provide context for decisions on the meeting agenda. The funding gap for high needs pupils is projected to be £57.5m. The report also includes budget monitoring information for quarter three 2024-25. This indicates that the accumulated DSG deficit is projected at £108m for March 2025, rising to £165.5m by March 2026.

**RESOLVED that**

- 1. The contents of the report be noted.**
- 2. That the budgets within the central schools services block (CSSB) as detailed in paragraph 20 of the report be agreed.**

Voting: Unanimous

**25 Innovation Fund**

The Interim Head of Schools Inclusion presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'B' to these Minutes in the Minute Book.

This report provided further information relating to the proposals for the use of the £2.8 million Innovation Fund.

The Fund was proposed as a way to provide support to mainstream schools to enable them to successfully maintain more placements for pupils with SEND in their mainstream settings to reduce the number of new ECHNAs and use of Alternative Provision where possible. This report includes the content of those proposals, the breakdown of the financial costs, and potential consequences from the decision made by Schools Forum.

The forum raised questions about whether the £500,000 allocated for outreach would be distributed over a period of time. It was confirmed that this amount would serve as the annual allocation for the financial year, in addition to the existing funding for outreach. The forum was assured that the application process for this funding would be transparent, with clear criteria established. The SEND Sufficiency Progress Board would review the applications, and officers informed the forum that they could share relevant information about this process.

Additionally, the forum was informed that KPIs and service level agreements would be established to measure the effectiveness of the funding. These would outline key deliverables and emphasise the importance of early intervention. The forum agreed that safeguards were necessary for smaller schools, ensuring that funding bids would be accessible to all institutions.

**RESOLVED that Schools Forum:**

- Note the information in the report,
- Recommend agreement for provision of the £2.8 million funding for BCP Council to proceed with the proposed actions including a preference for it to be allocated to the most useful area of training based on the available information,
- consider the benefits of agreeing ongoing funding for the Inclusion Consultant roles as opposed to restricting the funding to one year and repeated approvals where posts would have to remain fixed term for short periods, reducing the potential pool of candidates who would apply, and
- consider the context of the current landscape when making its recommendation in relation to the Innovation Fund. If it considers recommending against the Innovation Fund, this report recommends that Schools Forum will need to consider what it sees as the alternative solution to the Innovation Fund to support the work with mainstream inclusion moving forwards
- once the decision has been finalised, at least two members of the Schools Forum will participate in the discussion to ensure that the Forum has oversight and can contribute to the final decision regarding funding allocation.

Voting: Unanimous

The Forum recognised that progress had been needed on this item but was mindful that the Schools Forum had to monitor it and might need to consider future funding allocations.

The Chair advised he would reach out to Schools Forum members to confirm who would participate in the final discussion. **ACTION**

**26 Mainstream Funding and Transfer to High Needs 2025/26**

The Assistant Chief Financial Officer presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'C' to these Minutes in the Minute Book. The Schools Forum would be consulted on the local mainstream school funding formula and was requested to make recommendations to Council to cover the differing levels of funding transfer that could be finally agreed as decisions from the DfE remain outstanding. The report sets out the outcome of applying the 2025-26 National Funding Formula (NFF) to the October 2024 schools census data and options for the local mainstream schools funding formula linked to the final decision regarding a transfer of funding to high needs. It also sets out the 2025-26 growth fund budget for approval.

BCP Council confirmed to the Forum that they would seek a transfer of 1% from the DfE, even if the Schools Forum were not in agreement.

The Schools Forum was informed that BCP Council had not consulted all schools prior to making the decision, as required by the Schools Operating Guide. However, they confirmed that extensive consultation had taken place regarding the innovation fund. It was noted that information from the DfE was received too late for effective consultation with all schools this year if the DfE timetable was to be met. However, consultation could still be done, and the Schools Forum reconvened if considered necessary. The Inclusion Fund and the Forum papers from previous meetings had been shared with the DfE. The funding transfer would be used for the innovation fund and not set against the deficit.

**All Members:**

1. **RESOLVED that a transfer of £1.1m, being surplus school block funding, be supported as a transfer to support expenditure on high needs pupils in the light of the December settlement for 2025-26 and outcome of the national funding formula (NFF) for mainstream schools.**

Voting: 11 in favour; 0 against; 3 abstentions

The following options were also considered and rejected by the Schools Forum:

- a. Transfer 0.5% with NFF allocations to be reduced by 0.11% being the maximum the Schools Forum alone can agree

Voting: 11 against; 0 in favour; 3 abstentions

- b. Transfer 1.0% with NFF allocations to be reduced by 0.61% being the amount needed to fully fund the proposed innovation fund and requiring approval of the DfE.

Voting: 11 against; 0 in favour; 3 abstentions

#### **School Members:**

2. **RESOLVED that the growth fund budget requirement of £150,000 as set out in paragraph 17 of the report be agreed.**

Voting: Unanimous

3. **RESOLVED that the Forum recommend to Council the following preferred options for the local mainstream formula for each level of transfer which could be finally agreed as set out in paragraph 29 of the report:**

- **Option 2a (all schools contributing) in regard to a 0.5% transfer.**

Voting: 7 in favour; 3 against; 3 abstentions

- **Option 3a (all schools contributing) in regards to a 1% transfer**

Voting: 6 in favour; 4 against; 3 abstentions

Options 2b (Excluding MPPFL only), 3b (Excluding MPPFL MFG at minimum) and 3c (Excluding MPPFL MFG at minimum Capping gains) were also considered and rejected by the Schools Forum.

The Forum requested to be informed about the outcomes of each request and to be advised on what had been agreed upon. Members of the Schools Forum expressed their respect for the democratic process of the Forum, however, they stated that they did not believe it was morally sound to top-slice funding from schools that were already receiving the minimum per pupil funding.

The Chair informed the Forum about two vacancies for primary school members and urged members to suggest any suitable candidates to fill those positions.

## **27 Central Retention and De-delegation Consultation**

The Head of School Places, Funding and Admissions presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'D' to these Minutes in the Minute Book.

Maintained School Forum members must be consulted on proposals for the central retention and de-delegated budget shares and agree these.

This report provides proposals for:

**Monday, 13th January, 2025**

- the central retention of services for the 2025/26 financial year where the LA retains a statutory duty to undertake activity to support maintained schools only (both mainstream and specialist);
- de-delegation of services for the 2025/26 financial year applicable only to mainstream schools. These are services where schools retain the statutory duties, but better efficiency could be achieved through central delivery by the LA.

**Following some discussion, Schools Forum did not agree to the recommendation outlined in the report. Instead, they suggested holding a meeting with all maintained headteachers to reach an agreement regarding this report outside of the meeting.**

**28 Forward Plan**

The Forward Plan for the Forum was noted.

**29 Dates of Future Meetings**

The date of the next meeting was confirmed as 23 June.

**30 Any Other Business**

None.

**Duration of the meeting: 10.00 - 11.54 am**

**Chairman at the meeting on  
Monday, 13 January 2025**

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**SCHOOLS FORUM**



Report subject	<b>Dedicated Schools Grant (DSG) Outturn 2024-25</b>
Meeting date	23 June 2025
Status	Public
Executive summary	<p>The report considers the end of year position for the DSG budget 2024-25. The budget was set with a funding gap of £28m, a similar level compared with the previous year, with the expectation that the innovation fund and other initiatives would start to have impact in reducing the demand for education health and care plans (EHCPs). This was alongside the creation of new SEND places in mainstream schools through capital investment to limit the use of higher cost independent provision.</p> <p>The outturn is a net in-year funding gap approaching £50m. This is £5m more than indicated at quarter three. There is an element of one-off additional high needs spending over the final quarter, but it is likely most previously unforeseen costs will be on-going.</p> <p>More children are remaining in mainstream schools but the growth in demand for EHCPs overall has more than offset any potential savings. The demand has continued to grow for independent school places, alternative provision, and bespoke arrangements for those unable to attend any school setting.</p> <p>The trajectory of the accumulated deficit has therefore continued a significant upward path from £65.5m for March 2024, to £113.3m for March 2025.</p>
<b>Recommendations</b>	<b>It is RECOMMENDED that Schools Forum note the contents of the report.</b>
Reason for recommendations	Schools Forum is to be notified of the DSG outturn position.
Portfolio Holder(s):	Councillor Richard Burton – Children and young People
Corporate Director	Cathi Hadley, Children’s services
Report Authors	Nicola Webb, Assistant Chief Finance Officer <a href="mailto:nicola.webb@bcpcouncil.gov.uk">nicola.webb@bcpcouncil.gov.uk</a>
Wards	All
Classification	For Information

## Summary DSG Outturn 2024-25

1. The DSG accumulated deficit has grown rapidly from £4.6m in March 2020 to £65.5m over the four years to March 2024. The deficit has increased to £113.3m for March 2025 as demand for high needs support continues to outstrip the local capacity and with low DSG funding growth. The three other funding blocks are broadly balanced.
2. The table below summarises the DSG 2024-25 outturn for each funding block, with narrative following and a detailed budget monitoring statement in the appendix.

**Table 1: Summary DSG Outturn 2024-25**

			<b>Funding</b>	<b>Spend</b>	<b>Net</b>
Early Years	Budget	£000's	-35,054	35,054	0
	Actual	£000's	-35,719	35,640	-79
	Variance	£000's	-664	586	-79
School Block	Budget	£000's	-263,441	263,441	0
	Actual	£000's	-263,441	263,398	-44
	Variance	£000's	0	-44	-44
Central School Services Block	Budget	£000's	-2,112	2,111	-1
	Actual	£000's	-2,111	2,106	-5
	Variance	£000's	0	-4	-4
High Needs Block	Budget	£000's	-62,182	90,267	28,085
	Actual	£000's	-62,034	111,906	49,872
	Actual	£000's	-62,969	510,142	447,173
	Variance	£000's	147	21,639	21,786
Total DSG	Budget	£000's	-362,789	390,873	28,084
	Actual	£000's	-363,305	413,050	49,744
	Variance	£000's	-516	22,177	21,660

## DSG Income

3. The outturn includes a net increase in funding of £0.5m. This is due to an increase in the forecast for early years provision (to be finalised in summer 2025). This has been partially offset by the reduction for the high needs block in summer 2024 from the import/export adjustment to take account of the cross-border flow of pupils in high needs places based on the January 2024 census. Any funding variance from the above early years estimate will be reflected in the DSG outturn for 2025/26.

## Early Years Block

4. The early years budget was set to be balanced. The forecast outturn reflects that a funding increase is expected to be received compared with budget to broadly match the additional expenditure incurred on the free entitlements. This was the first year of the extended entitlement for working parents with trends yet to be established for DfE estimates of funding and similarly for the council.

## Schools Block

5. The mainstream schools funding formula was paid to mainstream schools and recouped by the ESFA according to the formula set in January 2024. The final cost of business rates was ahead of budget, and the central growth fund was not used as all agreed basic need growth was allocated through the formula by an adjustment to pupil numbers for September 2024 rather than the full budget being based on the October 2023 census for the relevant schools.

## Central Schools Services Block

6. The cost of school's forum has reduced due to the continuation of virtual meetings throughout the year.
7. The historic commitments funding was restored to previous levels following the annual submission of evidence to the DfE that commitments were not reducing in 2024/25. In 2025/26 this funding has not been fully restored with a small deduction made which is likely to be a signal that this funding is now starting to be phased out ahead of the commitments ending.

## High Needs Block

8. The high needs expenditure is significantly ahead of budget. The historic trajectory of expenditure growth was budgeted to be curtailed for 2024/25. This was based on the slowdown in demand being experienced over autumn 2023 and the initiatives being planned through the development of the 15-year deficit recovery plan. In the event, the slowdown in demand was short lived, and the development of the inclusion fund and wider children's services improvements took longer than expected with little financial benefit in the year.
9. A greater proportion than previously of the new demand was accommodated in mainstream provision with payments to mainstream schools ahead of budget. However, the surge in demand also meant greater use of independent schools, alternative provision and bespoke therapies due to capacity constraints in the state sector. This undermined the key assumptions in the budget. There was some offset from low spend charged to the inclusion fund budget due to the delayed timescale of implementation.

## Summary Financial Implications

10. A summary of the DSG outturn for 2024/25 in the context of the accumulated deficit is set out in the table below:

**Table 2: Summary position for dedicated school's grant**

Dedicated Schools Grant	£m
<b>Accumulated deficit 1 April 2024</b>	<b>63.5</b>
Budgeted high needs funding shortfall 2024/25	28.1
High needs overspend 2024/25	21.8
Underspend across other areas	(0.1)
<b>Accumulated deficit 31 March 2025</b>	<b>113.3</b>

11. The deficit is carried forward in a specific negative reserve on the council's balance sheet by a statutory override that suspends the normal accounting practice (negative reserves are normally not permitted and funding sources must be established).
12. This approach was intended to be short term while the DfE found a solution to the growing DSG deficits in many councils. The national safety valve programme, within which the council developed the deficit recovery plan, has not found a solution to the national problem and is now closed to new participants. The council was unable to secure additional funding through the programme, as the recovery plan did not show the high needs block being balanced within a relatively short timescale, a typical expectation being around five years.
13. The government has announced the aim of making the SEND system more inclusive and improve outcomes for all children and young people, with a commitment to reform the current SEND system. Details of the government's intended approach to reform will be set out in a Schools White Paper in the autumn. How local authorities will be supported in transitioning to a reformed SEND system will be set out in the upcoming local government funding reform consultation.

### **Legal Implications**

14. It is a requirement of the council to monitor budgets during the financial year, and for school's forum to be informed of the DSG outturn.

### **Summary of human resources implications**

15. There are no direct human resources implications from the recommendations in this report.

### **Summary of sustainability impact**

16. There are no direct sustainability impacts from the recommendations in this report.

### **Summary of public health implications**

17. The council is seeking to maintain appropriate services for the vulnerable as well as improve the sustainability of services important for the wellbeing of all residents.

### **Summary of equality implications**

18. Budget holders are managing their budgets with due regard to equalities issues.

### **Summary of risk assessment**

19. The outturn is prepared based on the best estimates available to close the financial statements. Any variations to these will impact in the 2025/26 financial year.

### **Background Papers**

20. The DSG budget for 2024/25 was set out and discussed in the Schools Forum meeting in January 2024. The link to all School's Forum papers is available through the link below:  
[http://ced-pri-cms-02.ced.local/ieListMeetings.aspx?Committeed=149&\\$LO\\$=1](http://ced-pri-cms-02.ced.local/ieListMeetings.aspx?Committeed=149&$LO$=1)

**Appendix - Presentation of detailed DSG outturn budget variances for 2024-25.**

Appendix DSG Outturn 2024-25	Early Years £000's	Schools £000's	Central Services £000's	High Needs £000's	Total Budget £000's	Actual	
						Outturn £000's	Variance £000's
DSG under 2 year olds NFF	-4,141				-4,141	-4,073	68
DSG 2 year olds NFF	-9,140				-9,140	-9,610	-471
DSG 3 year olds NFF	-21,229				-21,229	-21,554	-326
DSG Pupil Premium	-330				-330	-357	-27
DSG Disability Access Fund	-215				-215	-122	93
DSG Prior Year					0	-2	-2
DSG NFF School Block		-261,054			-264,765	-264,765	0
DSG Premises		-1,832				0	0
DSG Growth Fund NFF		-1,879				0	0
Block Transfer	0	1,324	0	-1,324	0	0	0
DSG High Needs Block				-60,858	-60,858	-60,710	147
DSG Central School Services			-2,112		-2,112	-2,111	0
<b>Total Funding</b>	<b>-35,054</b>	<b>-263,441</b>	<b>-2,112</b>	<b>-62,182</b>	<b>-362,789</b>	<b>-363,305</b>	<b>-516</b>
Providers - under 2 year olds	3,830				3,830	4,743	913
Providers - 2 year olds	8,546				8,546	8,921	376
Providers - 3 and 4 year olds	19,637				19,637	19,374	-263
Providers SEN top up grants	1,380				1,380	1,301	-80
Early Years Pupil Premium	330				330	357	27
Disability Access Fund	215				215	122	-93
Contingency	254				254	0	-254
Early Years LA duties	863				863	821	-42
Mainstream Schools Formula		263,307			263,307	263,398	90
Growth Fund		134			134	0	-134
School Admissions			410		410	410	0
Servicing Schools Forum			10		10	1	-9
Ex ESG Services (all schools)			1,057		1,057	1,057	0
Commitments - Premature retirements			17		17	17	0
Commitments - ASD Base/ other			275		275	274	-1
Licences Purchased by DfE			342		342	348	6
Place Funding				14,931	14,931	14,814	-117
Top up Funding - State Sector				31,689	31,689	34,065	2,376
Top up Funding - Independent/NMSS				20,994	20,994	30,704	9,710
Top up Funding - Post Schools				9,029	9,029	8,004	-1,025
Top up Funding - Pre schools				107	107	224	117
Top up Funding - Excluded Pupils/AP				2,582	2,582	5,039	2,458
Commissioned Services				1,611	1,611	2,439	828
Hospital Education Top up				0	0	64	64
Bespoke SEN/Therapies - all ages				2,744	2,744	12,070	9,326
Support for Inclusion				160	160	144	-16
Special Schools grants				1,925	1,925	1,918	-7
Inclusion Fund				2,750	2,750	464	-2,286
Early Years Central SEN support				869	869	861	-9
Sensory Impaired Service				876	876	1,095	220
<b>Total Expenditure</b>	<b>35,054</b>	<b>263,441</b>	<b>2,111</b>	<b>90,267</b>	<b>390,873</b>	<b>413,050</b>	<b>22,177</b>
<b>In-year (surplus) / deficit budget</b>	<b>0</b>	<b>0</b>	<b>-1</b>	<b>28,085</b>	<b>28,084</b>	<b>49,744</b>	<b>21,660</b>
<b>In year (surplus) / deficit actual</b>	<b>-79</b>	<b>-44</b>	<b>-4</b>	<b>21,786</b>	<b>63,512</b>	<b>63,512</b>	
<b>Deficit carried forward</b>					<b>91,596</b>	<b>113,256</b>	

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**SCHOOLS FORUM**



Subject	<b>High Needs Update for 2025/26</b>
Meeting Date	23 June 2025
Executive Summary	<p>The report provides a summary of the high needs budget for 2025-26 and includes details of new activities to support pupils with additional needs in mainstream schools – the inclusion fund and outreach plus.</p> <p>The inclusion fund is funded by surplus school block funding as agreed by Schools Forum in January 2025. The report sets out the how the fund will be allocated in 2025-26 following further consultation with headteachers since February this year.</p> <p>Outreach plus is a new service to support mainstream schools establish resourced provision with the aim of increasing specialist capacity for children with autism spectrum condition and social, emotional and mental health needs.</p> <p>Once fully implemented these two activities should deliver savings to the high needs budget through future cost avoidance.</p>
<b>Recommendations</b>	To note the contents of the report.
Reasons for Recommendations	To update School’s Forum on the high needs block 2025-26
Portfolio Holder(s):	Councillor Richard Burton – Children and young People
Corporate Director	Cathi Hadley
Report Author (s)	<p>Lisa Linscott, Director of Education  <a href="mailto:Lisa.Linscott@bcpcouncil.gov.uk">Lisa.Linscott@bcpcouncil.gov.uk</a>                      Nicola Webb, Assistant Chief Finance Officer  <a href="mailto:nicola.webb@bcpcouncil.gov.uk">nicola.webb@bcpcouncil.gov.uk</a>                      Chis Lee, Interim Head of Inclusion  <a href="mailto:chris.lee@bcpcouncil.gov.uk">chris.lee@bcpcouncil.gov.uk</a></p>
Wards	Council-wide
Classification	For Information

## Summary High Needs Budget 2025-26

1. The table below sets out the high needs budget for 2025-26 alongside the final outturn for 2024/25 for context.

**Table 1: High Needs Budget 2024/25 and 2025/26**

	2024/25	2025/26	
<b>DSG High Needs Budget</b>	<b>Outturn</b>	<b>Budget</b>	<b>Increase</b>
	<b>£000's</b>	<b>£000's</b>	<b>£000's</b>
Place Funding	14,814	18,518	3,704
Top up Funding - State Sector	34,065	33,828	-237
Top up Funding - Independent/NMSS	30,704	31,237	533
Top up Funding - Post Schools	8,004	11,982	3,978
Top up Funding - Pre schools	224	374	150
Top up Funding - Excluded Pupils/AP	5,039	4,500	-539
Commissioned Services	2,439	2,809	371
Hospital Education Top up	64	100	36
Bespoke SEN /Therapies	12,070	14,238	2,168
Support for Inclusion	144	200	56
Teachers Pay & Pension Grants	1,918	2,000	82
Inclusion Fund	464	1,237	773
Early Years Central SEN support	861	1,266	405
Sensory Impaired Service	1,095	922	-173
<b>Total Expenditure</b>	<b>111,906</b>	<b>123,211</b>	<b>11,305</b>
<b>Funding</b>	<b>62,034</b>	<b>65,708</b>	<b>3,674</b>
<b>High Needs Funding Gap</b>	<b>49,872</b>	<b>57,502</b>	<b>35,716</b>

2. The outturn for 2024-25 was high needs expenditure of £111.9m compared with funding of £62.0m (a DSG funding gap of £49.9m). This outturn was £5.3m more than the quarter three forecast which informed the budget set for 2025-26 in February 2025.
3. The expectation in the high needs budget for 2025-26 is that the annual funding gap will grow to £57.5m as demand growth is expected to be on-going. There are initiatives in the SEND improvement plan (an element being invest-to-save) that should have an impact on the high needs budget over time.
4. The new year budget would have been 16% higher than the forecast outturn for 2024/25 established in quarter three. Compared with the final outturn, annual expenditure growth budgeted for 2025-26 is now only 10%. This is still a considerable increase but less than historic annual growth.
5. There were some non-recurring payments made in the final months of the year that had not been included in the forecast but most of the increase is likely to be ongoing as more young people were being supported by the high needs budget by March 2025 than had been expected.
6. The forecast outturn for 2025-26 will be considered at the September meeting. New assumptions will be needed to reflect current levels of demand and data trends, updated cost expectations and factor in initiatives in progress to manage costs going forward.

## **Inclusion Fund 2025-26**

7. The 2025-26 high needs budget allocated £1.2m to the inclusion fund. This was finalised based on the decision of Schools Forum in January 2025 to permit the transfer to high needs of surplus school block funding. The surplus is the balance available after all mainstream schools had been allocated funding according to the national funding formula (NFF) in full and a central growth fund provided.
8. The amount is higher than the forecast surplus of £1.1m reported at the January 2025 meeting as the DfE disallowed continuation of the exceptional premises funding factor for joint use agreements for two schools. An application for inclusion in the local formula was required annually and until the current year consent had been given. This funding is included in the 2025-26 school block allocation to the council (as this is based on previous year exceptional premises costs in the local formula), but it will no longer be included from 2026-27.
9. The DfE did not permit a higher level of transfer to fully fund the inclusion fund proposals that had been drawn up in consultation with headteachers and presented to Schools Forum over the autumn. The inclusion fund has been scaled back accordingly.
10. As a result of the decreased level of funding available, schools were consulted on which aspects of the inclusion fund to take forward through the remaining £1.2m at the Head Teacher Forum on 26 February 2025. After discussion at this event and further feedback from our online invitation, it was agreed to take the following options forward:
  - a. The provision of additional specialist outreach support for mainstream schools via £550,000.
  - b. A pilot of three inclusion advisor posts to work with a decided patch of mainstream schools to trial their impact over the next year via circa £270,000.
  - c. To deliver training and development support to mainstream schools as per the original proposals and enabling schools to choose which option would be more impactful for them at circa £380,000.
11. Processes are now underway to enable implementation of these elements from September 2025, with an impact review to then take place in 2026-27 to assess the difference made as a result of these support elements being in place.

## **Outreach Plus**

12. Outreach plus is a group of services to support mainstream schools in establishing resourced provision as part of the delivery of the SEND sufficiency programme of work. The aim of this work is to increase the availability of places for children with an education, health and care plan (EHCP).
13. The council is working with special school headteachers to agree a package of support that will enable mainstream school headteachers to establish resourced provision under the advice and guidance of specialist staff.
14. Building on round one of the sufficiency programme, round two is focused on commissioning resourced provision in mainstream primary and secondary schools for children with autism spectrum condition and social, emotional and mental health needs. In applying the learning from round one, services to support our mainstream school headteachers are vital to ensure our newly commissioned resourced provision operate as inclusive models that enrich the entire school community by valuing diversity, promoting individualised learning, enhancing staff expertise, and embedding a culture of inclusion and belonging.

## **Service aims and objectives**

15. The overall aim is to provide specialist advice and support to BCP mainstream schools to enhance their skills and expertise to effectively meet the requirements of children with additional needs.
16. The service aims to:
  - Provide specialist advice and guidance to mainstream schools
  - Provide training and guidance to mainstream schools
  - Increase opportunities for children and young people with additional needs to reach their academic potential within mainstream schools
  - Promote effective practice in meeting the needs of all children and young people
17. The service objectives are:
  - To improve provision and outcomes for children and young people with SEND enabling schools to provide the right place at the right time and with the right support
  - To improve confidence and capacity to meet special educational needs in local mainstream schools
  - Preventing schools from being SEN magnet schools, widening the distribution of provision available for children and families
  - To develop inclusive environments and develop expertise in mainstream schools
  - To provide children and young people with SEND with equitable educational opportunities alongside their peers
  - To review the data and information to inform future service planning.
  - To use collated data and information to determine the financial impact of the service.

## **Service Description**

18. The service will provide targeted support, advice, guidance and training to mainstream primary and secondary schools seeking to develop resourced provision. The service will be allocated to schools who form part of round two of the SEND sufficiency programme of work and appropriate support will be provided following an initial audit of each school and associated proposal.
19. Accessibility: Access to the service will be through round two of the SEND sufficiency programme. The special school will audit the maintained school's proposal for the development of the Resourced Provision to assess the scope of work.
20. Population covered: The service will work with learners in mainstream education settings covering the primary and secondary age range.
21. Interdependence with other service providers: The service provider will be expected to work in collaboration with the SEND local area partnership which includes local authority officers, relevant health professionals, local schools, teaching schools hubs and other local providers.
22. The service will provide a formalised package of support for a maximum period of one year and will assist mainstream school headteachers in the following areas:

- Curriculum
- Planning
- Assessment
- Environment
- Sensory
- Timetabling
- Resource advice
- Staff training
- In-reach / observations
- Consultancy

### 23. **Year 1 Support Programme**

Duration: 2 Terms

- Initial meeting following submission of request for support, what is already in place, what support the school has identified?
- Allocation of senior leader & team - mainstream school & Linwood
- Planning meeting to look at student need – EHCPs / outside agency reports / IEPs etc
- Areas of focus established & UP3 expert teachers allocated
- Support schedule drawn up, half termly review points set

Duration: 1 Term

- Planning for areas to develop further, growth & succession
- Support schedule drawn up, half termly review points set

24. **Year 2** – Individual school takes responsibility for training and development of staff

25. Providers of the Service: The council will imitate a light touch expression of interest to commission special schools in BCP to provide the support to local mainstream primary and secondary schools.

### **Financial implications of outreach plus**

26. Round two is expected to deliver a total of 20 projects over at least two academic years (depending on the scale of individual projects). This could provide a total of between 160 places – 240 places depending on a range of between 8-12 place provisions.

27. The cost of a support package for each school is a maximum of £20,000 which necessitates a total budget of £0.4m over a 2-year period. This covers the costs of outreach teachers/backfilling, training, site visits, initial audit and assess, plan, do review approach. It is planned that the cost is met from the High Needs Budget.

28. The table below sets out that the impact of the cost of the service on the cost per place in year one. It shows a year one additional cost of £2,500 based on an 8-place provision. This brings the total cost per place for resourced provision to £23,300 based on an 8-place provision. The costs per place decrease for provisions based on 10 and 12 places. The year 2 costs reduce to £22,000 per place. This is a cost avoidance of £4,000 per place taking an estimated cost of a special school place of £25,000.

<b>Year 1</b>	<b>Cost per place</b> £	<b>8 Places</b> £	<b>10 Places</b> £	<b>12 Places</b> £
<b>Element 1, 2 and 3 funding</b>	22,000	176,000	220,000	264,000
Running Costs	1,000	8,000	10,000	12,000
<b>Year 1 costs</b>	<b>23,000</b>	<b>184,000</b>	<b>230,000</b>	<b>276,000</b>
Cost of outreach per school and per place	20,000	2,500	2,000	1,667
<b>Cost of provision based on 8, 10, 12 places</b>		<b>186,500</b>	<b>232,000</b>	<b>277,667</b>
Cost per place including the cost of outreach		23,313	23,200	23,139

<b>Year 2</b>	<b>Cost per place</b> £	<b>8 Places</b> £	<b>10 Places</b> £	<b>12 Places</b> £
<b>Element 1, 2 and 3 funding</b>	22,000	176,000	220,000	264,000
Cost per place		22,000	22,000	22,000

### **Summary Financial Implications**

29. The financial implications for the DSG high needs budget are set out in the body of the report.

### **Legal Implications**

30. The Schools Forum regulations require Schools Forum to be consulted on arrangements for pupils with high needs.

### **Summary of human resources implications**

31. There are no direct human resources implications from the recommendations in this report.

### **Summary of sustainability impact**

32. There are no direct sustainability impacts from the recommendations in this report.

### **Summary of public health implications**

33. The council is seeking to maintain appropriate services for the vulnerable as well as improve the sustainability of services important for the wellbeing of all residents.

### **Summary of equality implications**

34. Budget holders are managing their budgets with due regard to equalities issues.

## **Summary of risk assessment**

35. The high needs budget funding gap is an ongoing risk to the council's financial health. Government is aware of this national problem with an indication given that consultation on a way forward will be issued in due course.

## **Background Papers**

36. The DSG budget for 2025/26 and implementation of the inclusion fund was set out and discussed in the Schools Forum meetings over the autumn and spring of financial year 2024/25. The link to all School's Forum papers is available through the link below:

[http://ced-pri-cms-02.ced.local/ieListMeetings.aspx?Committeed=149&\\$LO\\$=1](http://ced-pri-cms-02.ced.local/ieListMeetings.aspx?Committeed=149&$LO$=1)

## **Appendices**

None

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**SCHOOLS FORUM**



Report subject	<b>Schools Forum - Exceptional Circumstances Funding for 202526</b>
Meeting date	23 June 2025
Status	Public Report
Executive summary	<p>The report provides an update on:</p> <ul style="list-style-type: none"> <li>- The Exceptional Circumstances Funding for 2025/26.</li> <li>- The resolution of previously unpaid funding from Autumn 2023 to Spring 2025.</li> </ul> <p>A revised criteria and funding model is now in place for 2025-26 that will be reviewed after 2 months to determine future frequency of calculation moving forwards.</p> <p>Previously unpaid funding amounts have now been paid to all eligible schools on 30.05.25.</p>
Recommendations	<p><b>It is RECOMMENDED that:</b></p> <p><b>Schools Forum are to note the contents of the report.</b></p>
Reason for recommendations	To update School's Forum on the Exceptional Circumstances Funding 2025-26

Portfolio Holder(s):	Councillor Richard Burton – Children and young People
Corporate Director	Cathi Hadley
Report Authors	Chris Lee, SEND & Inclusion Consultant
Wards	Council-wide
Classification	For Information

### **Background from High Needs Funding: 2025 to 2026 operational guide**

1. Local authorities are statutorily responsible for overseeing the local offer of services and provision to meet the special educational needs of children and young people in their area.
2. The government has made it clear that the general direction of SEND reform is towards establishing a mainstream school and college environment that is more inclusive of children and young people who need specialist SEND provision, including in SEN units and resourced provision (RP). DfE is working on a range of reforms that will facilitate that shift.
3. Local authorities can provide additional targeted funding from their high needs budget, and outside the main funding formula for mainstream schools and academies on a consistent and fair basis, where:
  - a. there is a disproportionate number of pupils with SEND, and/or with more complex SEND
  - b. that number cannot be reflected adequately in the funding they receive through the local funding formula
4. They should define the circumstances in which additional funding will be provided from their high needs budget, through a formula or other methodology agreed with schools. In all cases, the distribution methodology should be simple and transparent, and devised so that additional funds are targeted only to a minority of schools which have particular challenges because of their disproportionate number of pupils with SEN and/or high needs, or their characteristics.

### **Historical Context**

5. The last payment of Exceptional Circumstances Funding had been made to schools to cover the Summer Term 2023. No further payments had been made to schools since this date.
6. The Funding formula used to calculate the eligibility of schools was based upon a threshold of 3% of the school's pupil population having an EHC Plan. This figure was based on previous national and local averages and at a point where having higher than this level was considered to be exceptional for schools. Funding was then allocated to eligible schools from a budget of £600,000. This figure was established when the previous round of payments totalled £200,000 for one school term and it was agreed to increase the budget to reflect this cost across three terms in a school year.

7. From the point of the last payment, discussions had taken place between schools and the Local Authority, without resolution of how future eligibility would be decided and payments calculated.

### **New Funding Formula from 2025-26**

8. A new funding formula and eligibility criteria has now been established by the Local Authority that will take effect from the start of the financial year 2025-26, with effect from 1<sup>st</sup> April 2025 and so the Summer Term of 2025 as the first term affected.
9. A number of different models and eligibility criterion were considered by Local Authority Financial and Strategic Leaders to establish a transparent and equitable system that acknowledged the exceptional circumstances that now exist across a significant number of mainstream schools in BCP, whilst still recognising those schools at the extreme end of these circumstances.
10. This funding will now be based upon a threshold criteria split of 4% and 6% of the school population with EHCPs. Those schools reaching the 4% threshold criteria will receive an amount of additional funding per child with an EHCP in their school. Those reaching the 6% criteria will receive a further additional payment on top of the 4% payment allocation.
11. This calculation will be based on children with EHCPs in the school from BCP Council only. It will not include EHCPs from other Local Authorities.
12. The allocated pot of £600,000 per year remains the same and will be pro-rated using number of months in a term to calculate the available funding for each term. There is no additional financial impact on the overall High Needs Budget.
13. The schools eligible will be calculated each term using the School Census data for that term.
14. Therefore, the amount funded per EHCP will vary each term due to the number of months variation and number of schools sharing the funding pot.
15. For the Summer Term 2025 this will be calculated once the Census data becomes available which is expected to be towards the end of July 2025. Eligible schools will be informed once this has been calculated.
16. Schools will not be required to submit any costed plans for how they intend to spend this allocation. It will be automatically allocated to schools without the need to submit any bid or paperwork.
17. This process will be carried out on a termly basis for a year, covering three terms of payments. Once this has been completed a review exercise will be carried out to compare the difference in calculating the amounts on a termly basis as against calculating them on an annual basis. This will then inform a decision as to how frequently eligibility of schools will be calculated from that point onwards.

## **Resolution of unpaid funding from Autumn 2023 to Spring 2025**

18. Unpaid additional funding from Autumn 2023 and Spring 2025 has been calculated on the previous lower threshold of 3% of school population with an EHC Plan. This has been calculated for each of the school terms in that period.
19. A payment to reflect the backdated amounts for each eligible school has now been made, with money entering school accounts on 30<sup>th</sup> May 2025. Schools that were eligible were individually notified of the amounts they would be receiving for this payment.

### **Summary Financial Implications**

20. The financial implications of the Exceptional Circumstances Funding are set out in the body of the report.

### **Legal Implications**

21. The Schools Forum regulations require Schools Forum to be consulted on arrangements for pupils with high needs.

### **Summary of human resources implications**

22. There are no direct human resources implications from the recommendations in this report.

### **Summary of sustainability impact**

23. There are no direct sustainability impacts from the recommendations in this report.

### **Summary of public health implications**

24. The council is seeking to maintain appropriate services for the vulnerable as well as improve the sustainability of services important for the wellbeing of all residents.

### **Summary of equality implications**

25. Budget holders are managing their budgets with due regard to equalities issues.

### **Summary of risk assessment**

26. The overall high needs budget funding gap is an ongoing risk to the council's financial health. Government is aware of this national problem with an indication given that consultation on a way forward will be issued in due course.

### **Background Papers**

27. High Needs Funding: 2025 to 2026 operational guidance  
<https://www.gov.uk/government/publications/high-needs-funding-arrangements-2025-to-2026/high-needs-funding-2025-to-2026-operational-guide>

### **Appendices**

**None**

**SCHOOLS FORUM**



Report subject	<b>Schools Forum Special School Banding Review</b>
Meeting date	23 June 2025
Status	Public Report
Executive summary	The report provides an update on progress made with the Special School Banding Review
<b>Recommendations</b>	<p><b>It is RECOMMENDED that:</b></p> <p><b>Schools Forum are to note the contents of the report.</b></p>
Reason for recommendations	To update School's Forum on the Special School Banding Review

Portfolio Holder(s):	Councillor Richard Burton – Children and young People
Corporate Director	Cathi Hadley, DCS
Report Authors	Chis Lee, SEND & Inclusion Consultant
Wards	Council-wide
Classification	For Information

**Background from High Needs Funding: 2025 to 2026 operational guide**

1. Local authorities are statutorily responsible for overseeing the local offer of services and provision to meet the special educational needs of children and young people in their area.
2. The High Needs Funding: 2025 to 2026 operational guide sets out the following funding streams for special schools' core staffing and other running costs:

<b>Funding element</b>	<b>Value</b>	<b>Data used</b>	<b>Inclusion in 2025 to 2026 MFG</b>
Place funding	Flat rate £10,000 per place	Number of places decided by provider local authority, in consultation with school	Yes
Top-up funding	Variable, may depend on local system of funding bands	Should reflect the cost of provision in excess of the place funding, necessary to make the provision that has been commissioned	Yes
Historic teachers' pay and pensions funding (previous TPG and TPECG)	Locked at 2020 to 2021 value per place	Number of places decided by local authority, in consultation with school	No, this is a separate high needs funding stream, not to be included in the MFG calculation
Additional 3.4% funding equivalent to mainstream schools additional grant (MSAG)	Locked at 2023 to 2024 value per place	Number of places decided by local authority, in consultation with school	No, this is a separate high needs funding stream, not to be included in the MFG calculation
CSBG (consolidated grant for 2025 to 2026, incorporating pay and pensions funding allocated as separate grants in the previous year) and NICs funding	Locked at 2024 to 2025 full-year value per place of combined TPAG, TPECG and CSBG, unless moving to national per-place rate following consultation, plus NICs funding block of CSBG allocated as above	Number of places decided by local authority, in consultation with school	No, this is a separate high needs funding stream, not to be included in the MFG calculation

### 3. Historical Context

4. The current funding system for Special Schools in BCP Council have been in place in largely the same format since the Local Government Review resulted in the formation of the unitary authority in April 2019.
5. Up to 2022-23 there was a wider variety of funded bands across the five special schools – a mixture of legacy council agreements and BCP 'add-ons' as below:

	No. Bands	Range	
	22-23	from	to
Linwood	7	302	22,880
Longspee	4	9,619	29,534
Montacute	7	3,824	29,677
Tregonwell	6	302	19,572
Winchelsea	6	1,696	27,695

6. In 2023-24, additional funding from the MFG was fed into the bottom of the bands to start bringing minimum funding more in line with the top up funding available in a mainstream school, as below:

	No. Bands	Range	
	23-24	from	to
Linwood	4	9,845	22,880
Longspee	3	13,318	29,534
Montacute	4	10,000	29,677
Tregonwell	1	19,483	19,483
Winchelsea	3	7,778	27,695

7. Ad hoc arrangements that make individual payments up to double some of the top band amounts are currently in place.
8. Special Schools in BCP have maintained a dialogue with the Local Authority for a number of years that current budgets are insufficient to deliver the provision they need to support the children attending their school and that a different system is required to update and recognise current positions.
9. Financially, the five special schools are in differing positions with some holding a financial surplus, and others holding a deficit or projected to be soon in deficit.
10. Benchmarking exercise
11. A benchmarking exercise was carried out by Bath and North-East Somerset across 11 Council Areas in the South West based on 2023/24 Banding rates paid to Special Schools in their areas. For information, the results of this are set out on the Slides in Appendix 1.
12. This exercise established that based on the figures provided, BCP pay the highest banding rate for children requiring the least amount of support i.e. the minimum top up amount provided, at an average of £12,084 per child. Values in other LAs range from £1,780 to £12,084, with the Average value being £4606 and the Median at £2,538.
13. In relation to the maximum top up amount provided, BCP pay the third highest banding rate for children requiring the most amount of support at an average of £25,853 per child. For this element, values ranged from £13,265 to £29,490, with an Average value of £21,845 and a Median of £22,734.
14. As an immediate neighbour, Dorset have recently set out their new model from September 2025. From this date, the funding envelope will be increased to allow for infrastructure to be increased by 3% and top ups by 6% giving a total formula funding increase of 3.2% on average (range 2.6% - 5.4% depending on locator mix; bearing in mind that place funding is not increased at all). This increase meets the DfE requirement of 0% Minimum Funding Guarantee (on like for like pupils.) The DfE

have stated that the place value will remain at £10,000 per commissioned place which is in addition to the figures in the tables following.

From September 25		Infrastructure				
Places		General	Split Site	Hydrotherapy		Locator >=7+,>25% per place
Beaucroft	230	386,439	164,907			2,397.16
The Harbour	140	386,439				2,760.28
Mountjoy	110	386,439		17,510		3,672.26
Westfield	230	386,439	119,480			2,199.65
Wyvern	90	386,439		17,510	154,500	6,204.99
Yewstock	165	386,439	132,977	17,510		3,254.10

From September 25		Infrastructure	Locator 2	Locator 3	Locator 4	Locator 5	Locator 6	Locator 7	Locator 7+	Locator 7++
Places	per place									
			793.68	2,915.29	5,567.04	8,492.99	12,190.58	19,328.99	30,150.76	46,390.60
Beaucroft	230	2,397.16	3,190.84	5,312.45	7,964.20	10,890.15	14,587.74	21,726.14	32,547.92	48,787.76
The Harbour	140	2,760.28	3,553.96	5,675.57	8,327.32	11,253.27	14,950.86	22,089.27	32,911.04	49,150.88
Mountjoy	110	3,672.26	4,465.94	6,587.55	9,239.30	12,165.26	15,862.85	23,001.25	33,823.03	50,062.87
Westfield	230	2,199.65	2,993.33	5,114.94	7,766.69	10,692.64	14,390.23	21,528.64	32,350.41	48,590.25
Wyvern	90	6,204.99	6,998.67	9,120.28	11,772.03	14,697.98	18,395.57	25,533.98	36,355.75	52,595.59
Yewstock	165	3,254.10	4,047.78	6,169.39	8,821.14	11,747.09	15,444.68	22,583.08	33,404.86	49,644.70

15. Work to date in BCP

16. Under the previous Interim Director of Education, a commitment was made to review the Special School Funding Model and implement a clear, transparent system for future funding allocation.

17. To this end, the special schools have been asked to provide a breakdown of their budgets for the 25-26 financial year, allowing for increases to NI, a 2.8% pay award and 2.8% inflation. The budget has been built based on the current cohort of pupils and class make up.

18. Information has then been collated to draw average costs for teachers, teaching assistants and other types of spend across the school. Costs have been collated under consistent categories to enable a reasonable comparison between schools. School returns were largely split by individual classes which helped form a view of the average costs of each class and the average level of need (based on band) in a classroom.

19. Average costs have been mapped against average needs and costs have been split against:

- a. 'child' – elements considered to be directly influenced by the pupils' needs and the classroom they need to be in. (Intention – to fund an amount per band (less any direct grants paid e.g. CSBG and historic grants like TPG, TPECG as would all be covered through this)).
- b. 'place' – elements considered specific to the broader school offer, premises and organisation (including costs not expected to change based on the needs of the child – and only the provision they attend). (Intention that anything over the £10,000 place funding would be covered by this element of top up).

Average 'Child' Costs:

	Minimum	Maximum	Average
Teaching Staff	£60,455	£79,052	<b>£72,573</b>
HLTA Staff	£0	£34,583	<b>£33,475</b>
TA staff (including 1:1)	£23,948	£31,579	<b>£25,450</b>

	Minimum	Maximum	Average
Therapies – SaLT	£232	£1,143	<b>£464</b>
Therapies - Occupational Therapy	£313	£1,143	<b>£554</b>
Therapies – Physiotherapy	£0	£934	<b>£286</b>
Therapies – Nurses	£0	£399	<b>£122</b>
Careers, IAG, Exams	£0	£2,279	<b>£1,044</b>
Medical Staff	£0	£825	<b>£151</b>
E19 - Learning resources (not ICT equipment)	£431	£3,570	<b>£946</b>
E20 - Variable - ICT Learning Resources - Variable	£15	£404	<b>£91</b>
E27 - Bought in professional services - curriculum	£0	£143	<b>£26</b>
E28 - Bought in professional services - non-curriculum	£0	£871	<b>£159</b>

These costs can be linked directly to the needs of pupils and show significant variation linked to average need.

### Average 'Place' Costs:

	Minimum	Maximum	Average
Leadership	£3,046	£8,915	£5,565
Safeguarding	£0	£3,897	£1,352
Family Support Staff	£0	£1,949	£972
Pastoral staff	£421	£3,353	£1,562
Business, Finance, ICT & HR	£934	£6,196	£2,423
Premises & Catering	£1,176	£6,197	£2,477
Admin, Annual Reviews	£691	£3,644	£1,593
PE, Music, Dance, Swimming, Interventions	£0	£2,305	£600
Other staff	£98	£662	£327
E08 - Indirect employee expenses	£92	£498	£206
E09 - Staff development and training	£146	£826	£310
E12 - Building maintenance and improvement	£490	£3,494	£1,279
E13 - Grounds maintenance and improvement	£14	£206	£59
E14 - Cleaning and caretaking	£317	£1,724	£751
E15 - Water and sewerage	£39	£242	£100
E16 - Energy	£57	£1,418	£514
E18 - Other occupation costs	£26	£3,511	£767
E20 - Fixed - ICT Learning Resources - Fixed	£99	£537	£244
E21 - Exam Fees	£0	£218	£79
E22 - Administrative supply	£25	£800	£290
E23 - Other insurance premiums	£27	£284	£91
E24 - Special facilities	£0	£7	£2
E25 - Catering supplies	£167	£955	£459
Other Fixed Costs	£0	£606	£164
Other Variable Costs	£0	£126	£31

Variation of individual elements here potentially reflects the variation in current funding levels between schools and providers 'cutting their cloth' accordingly.

### 20. Next Steps

21. A meeting was held with Special School Heads and Trust representatives on 23.05.25 to present the findings to date and discuss next steps to move the position forwards with a stated aim of being able to implement a new model for September 2025.
22. It was agreed to proceed with modelling the proposed new system on the split 'place' and 'child' costs and to establish a banding approach that would fit consistently across all schools.
23. To provide an updated Banding framework it was agreed to obtain Dorset's current banding framework and explore its application across the BCP Special Schools to determine its suitability. This will then be applied to the child and place model split to provide a proposed new structure and funding amounts for consideration by Schools and the LA.

24. This framework has now been obtained and will be shared with BCP Special Schools in advance of a further meeting to discuss its applicability to a cohort of pupils in each school as a sample.
25. If required a further Schools Forum Meeting will be requested before September 2025 to discuss and seek approval of a new model, and then also taken through the appropriate internal Council approval processes.

### **Summary Financial Implications**

26. The financial implications of the Special School Banding are not yet clear and will be set out in a future report once the exercise is complete.

### **Legal Implications**

27. The Schools Forum regulations require Schools Forum to be consulted on arrangements for pupils with high needs.

### **Summary of human resources implications**

28. There are no direct human resources implications from the recommendations in this report.

### **Summary of sustainability impact**

29. There are no direct sustainability impacts from the recommendations in this report.

### **Summary of public health implications**

30. The council is seeking to maintain appropriate services for the vulnerable as well as improve the sustainability of services important for the wellbeing of all residents.

### **Summary of equality implications**

31. Budget holders are managing their budgets with due regard to equalities issues.

### **Summary of risk assessment**

32. The overall high needs budget funding gap is an ongoing risk to the council's financial health. Government is aware of this national problem with an indication given that consultation on a way forward will be issued in due course.

### **Background Papers**

33. High Needs Funding: 2025 to 2026 operational guidance  
<https://www.gov.uk/government/publications/high-needs-funding-arrangements-2025-to-2026/high-needs-funding-2025-to-2026-operational-guide>

### **Appendices**

#### **Appendix A Benchmarking slides**

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# Special School Top Up Benchmarking

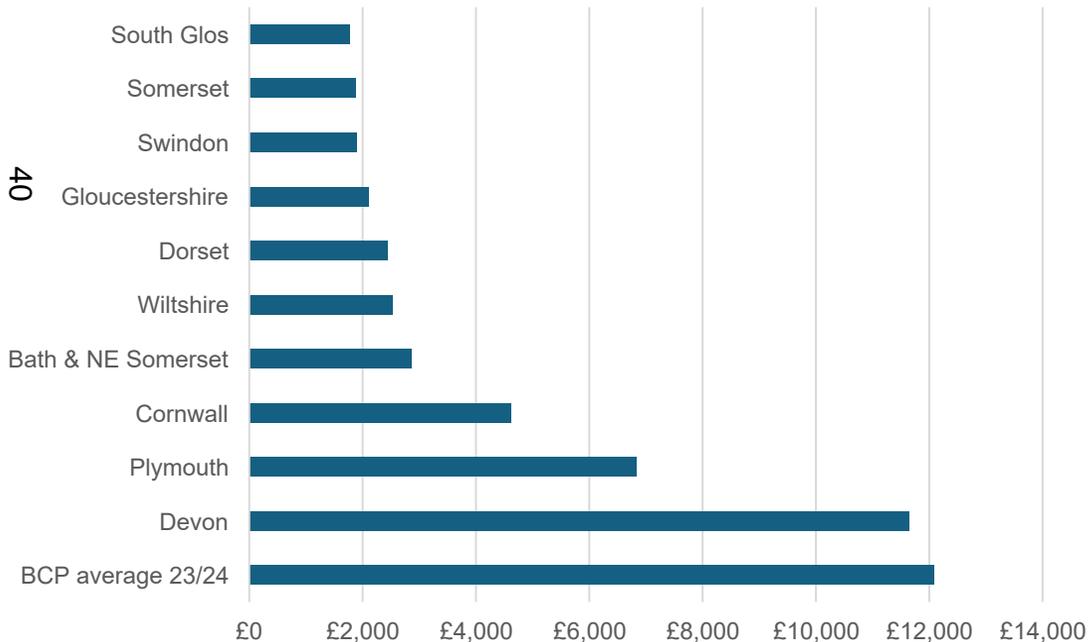


- Based on 2023/24 Banding rates across 11 Council Areas
- With thanks to Bath and North-East Somerset Council for compiling data
- (Note:
  - The average is the arithmetic mean of a set of numbers.
  - The median is a numeric value that separates the higher half of a set from the lower half.)

# 2023/24 benchmarking

## Standard Bandings Minimum Top Up

Special School Standard Bandings Minimum Top Up Amount (23/24 benchmarking data)



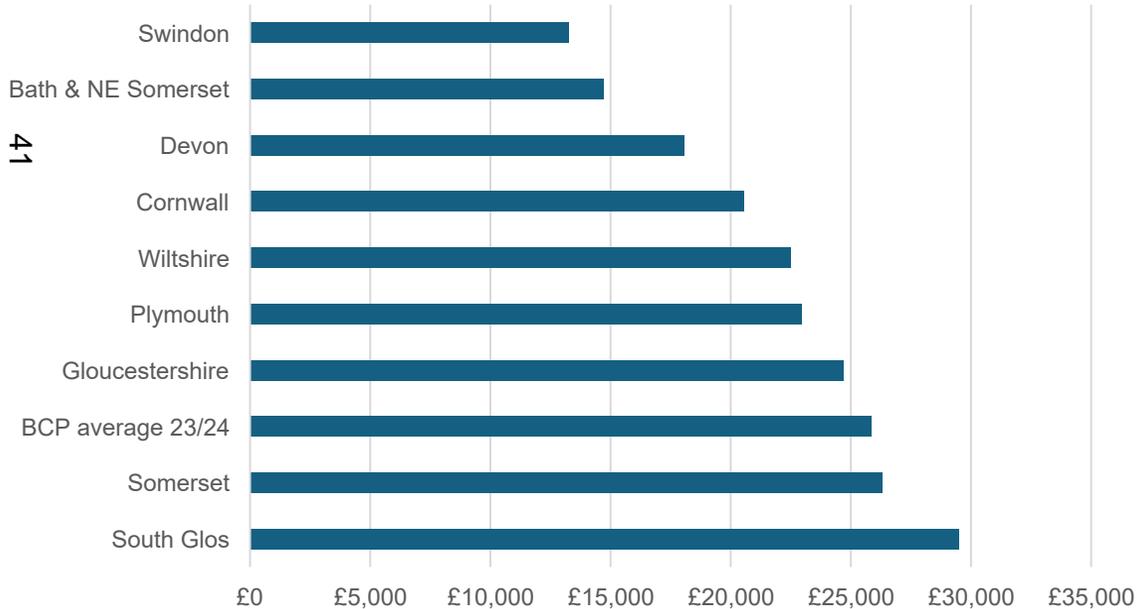
LA	Amount
BCP average 23/24	£12,084
Devon	£11,646
Plymouth	£6,825
Cornwall	£4,616
Bath & NE Somerset	£2,859
Wiltshire	£2,538
Dorset	£2,441
Gloucestershire	£2,116
Swindon	£1,890
Somerset	£1,876
South Gos	£1,780

- Out of 11 LAs, BCP pay the highest banding rate for children requiring the least amount of support
- Values range from £1,780 to £12,084
- Average Value is £4,606, Median is £2,538
- BCP pays above both at £12,084

# 2023/24 benchmarking

## Standard Bandings Maximum Top Up

Special School Standard Bandings Maximum Top Up Amount (23/24 benchmarking data)



LA	Amount
South Gos	£29,490
Somerset	£26,302
BCP average 23/24	£25,853
Gloucestershire	£24,693
Plymouth	£22,965
Wiltshire	£22,502
Cornwall	£20,555
Devon	£18,084
Bath & NE Somerset	£14,740
Swindon	£13,265

- Out of 10 LAs, BCP pays the 3<sup>rd</sup> highest banding rate for children requiring the most amount of support
- Values range from £13,265 to £29,490
- Average value is £21,845, Median is £22,734
- BCP pays above both at £25,853

# Dorset Model for September 2025

- From September 2025, the funding envelope will be increased to allow for infrastructure to be increased by 3% and top ups by 6% giving a total formula funding increase of 3.2% on average (range 2.6% - 5.4% depending on locator mix; bearing in mind that place funding is not increased at all).
- This increase meets the DfE requirement of 0% Minimum Funding Guarantee (on like for like pupils.)
- The DfE have stated that the place value will remain at £10,000 per commissioned place which is in addition to the figures in the tables following

# Dorset Model for September 2025



From September 25		Infrastructure				
Places		Hydrotherapy			Locator	per place
		General	Split Site	rapy	>=7+,>25%	
Beaucroft	230	386,439	164,907			2,397.16
The Harbour	140	386,439				2,760.28
Mountjoy	110	386,439		17,510		3,672.26
Westfield	230	386,439	119,480			2,199.65
Wyvern	90	386,439		17,510	154,500	6,204.99
Yewstock	165	386,439	132,977	17,510		3,254.10

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From September 25		Infrastructure	Locator 2	Locator 3	Locator 4	Locator 5	Locator 6	Locator 7	Locator 7+	Locator 7++
	Places	per place	793.68	2,915.29	5,567.04	8,492.99	12,190.58	19,328.99	30,150.76	46,390.60
Beaucroft	230	2,397.16	3,190.84	5,312.45	7,964.20	10,890.15	14,587.74	21,726.14	32,547.92	48,787.76
The Harbour	140	2,760.28	3,553.96	5,675.57	8,327.32	11,253.27	14,950.86	22,089.27	32,911.04	49,150.88
Mountjoy	110	3,672.26	4,465.94	6,587.55	9,239.30	12,165.26	15,862.85	23,001.25	33,823.03	50,062.87
Westfield	230	2,199.65	2,993.33	5,114.94	7,766.69	10,692.64	14,390.23	21,528.64	32,350.41	48,590.25
Wyvern	90	6,204.99	6,998.67	9,120.28	11,772.03	14,697.98	18,395.57	25,533.98	36,355.75	52,595.59
Yewstock	165	3,254.10	4,047.78	6,169.39	8,821.14	11,747.09	15,444.68	22,583.08	33,404.86	49,644.70

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## **Bournemouth, Christchurch and Poole Schools Forum**

### **Forward Plan**

#### **23 June 2025**

- DSG Outturn 2024-25
- High Needs Block Update
- Exceptional Cohort funding
- Special School banding – Item for Information
- Forward Plan

#### **29 September 2025**

- School Forum membership/reconstitution
- Quarter 1 Budget Monitoring and High Needs Update 2024-25
- DSG Outturn
- Forward Plan and dates for 2026/27

#### **18 November 2025**

- Finance Update – 2025-26 Dedicated Schools Grant (DSG) Budget Monitoring
- 2026-27 Financial Settlement
- 5 Year High Needs Forecast
- Early Years Single Funding Formula 2026-27
- School Balances
- Forward Plan

#### **19 January 2026**

- DSG Management Plan
- Mainstream School Funding and High Needs Transfer
- LAC Pupil Premium Arrangements
- Maintained School Services and Central retention
- Forward Plan

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