

Notice of Schools Forum



Date: Monday, 22 June 2026 at 10.00 am

Venue: Royal Hampshire Committee Room, BCP Civic Centre, Bournemouth
BH2 6DY / Via MS Teams

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
Gemma Sutter	Academies – Primary
Mark Avoth	Academies – Secondary
Sian Phillips	Academies – Secondary
Michelle Dyer	Academies – Secondary
Phil Midworth	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
Damon Parker	Early Years
Vacancy	Catholic Diocese
Richard Wharton	C of E Diocese Representative

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=6265>

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

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

This notice and all the papers mentioned within it are available at democracy.bcpccouncil.gov.uk

AIDAN DUNN
CHIEF EXECUTIVE

12 June 2026

DEBATE
NOT HATE



Available online and
on the Mod.gov app

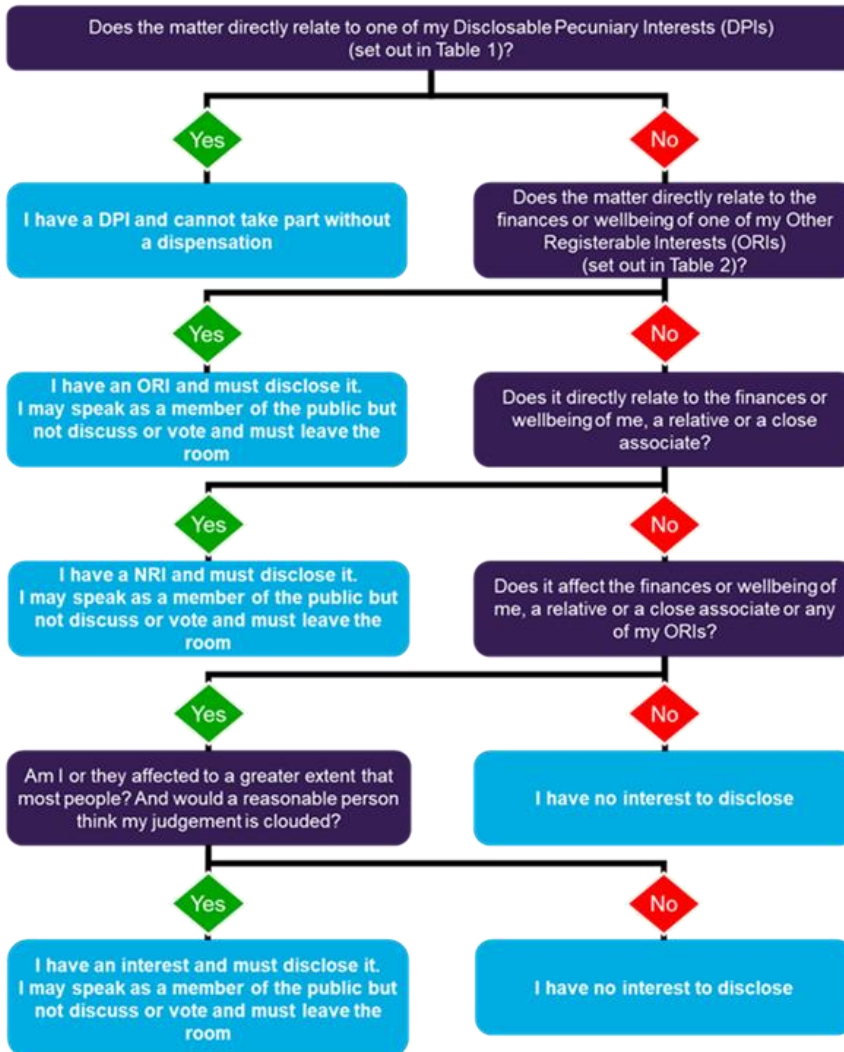


Maintaining and promoting high standards of conduct

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

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

5 - 10

To confirm the minutes of the previous meeting, held on 23 February 2026, as a correct record.

4. Schools Forum Future Meeting Arrangements

11 - 22

The Schools Forum is a statutory body established by the local authority in accordance with the School Forums (England) Regulations 2012. It advises the authority on matters relating to the funding of schools and must operate in line with statutory guidance issued by the Department for Education (DfE).

The Forum has, in recent years, operated successfully using virtual meeting arrangements in a hybrid environment.

To reflect this established practice and ensure clarity and compliance with governance requirements, it is proposed that the Terms of Reference are updated to formalise meetings as being held remotely. The revised Terms of Reference ensure that arrangements continue to meet statutory expectations, including openness, transparency and public access.

5. Dedicated Schools Grant (DSG) Financial Outturn 2025/26

23 - 32

The report considers the end of year position for the DSG budget 2025-26. The outturn is an in-year funding gap of £66.6m. This is £9.1m more than the budget, but an improvement compared with the quarter three forecast. The budget was set with the expectation that the innovation fund would start to have impact in reducing the demand for education health and care plans (EHCPs) alongside the creation of new SEND places in mainstream schools through capital investment to limit the use of higher cost independent provision. There is delay in both initiatives and the SEND reforms announced by government during the year have further fuelled demand. The result has been greater use than budgeted of high-cost independent school places, alternative provision and bespoke arrangements for children and young people unable to attend any school setting.

The trajectory of the accumulated deficit has therefore continued a significant upward path from £113.3m for March 2025, to almost £180m for March 2026. This deficit is carried forward by the council in a specific negative reserve by a statutory override that suspends the normal

accounting practice.

6. Local SEND Reform Plan

Verbal
Report

To receive a verbal update on the Local SEND Reform Plan.

7. BCP Experts at Hand Model

33 - 64

This report provides Schools Forum with an overview of the proposed BCP Experts at Hand partnership model, developed to strengthen early, inclusive and needs-led support for children and young people with SEND across schools and settings. The model is rooted in co-production with children, young people, families, practitioners and partners, and is designed to build confidence and capability within mainstream settings through timely access to specialist expertise, coaching, training, consultation and practical support. It aligns with the Graduated Approach to Inclusion and the emerging cluster-based targeted funding model, creating a coherent locality-based system focused on prevention, early intervention, reduced escalation and improved outcomes.

8. SEND Service – Exceptional Funding

65 - 72

This report provides an update on Exceptional Circumstances Funding arrangements for mainstream schools in Bournemouth, Christchurch and Poole for 2026/27. It reviews the 2025/26 funding model, sets out the financial and strategic context, and presents revised model options intended to ensure funding is transparent, sustainable and targeted to schools with the highest proportion of pupils with Education, Health and Care Plans. Schools Forum is asked to note the revised models, select the preferred option for 2026/27, and support ongoing review to ensure the approach remains fair, affordable and aligned with SEND reform priorities.

9. Any Other Business

To consider any other business, which, in the opinion of the Chairman, is of sufficient urgency to warrant consideration.

10. Forward Plan

73 - 74

To consider and note the Forward Plan

11. Dates of Future Meetings

The Forum is asked to note the previously agreed dates:

- 21 September 2026
- 16 November 2026
- 11 January 2027
- 21 June 2027

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.

BOURNEMOUTH, CHRISTCHURCH AND POOLE COUNCIL
SCHOOLS FORUM

Minutes of the Meeting held on 23 February 2026 at 10.00 am

Present: Geoff Cherrill (Maintained Special) – Chairman
Patrick Earnshaw (Academies – Secondary) – Vice-Chairman
Kate Carter, TEACH Academies Trust (Academies – Primary)
Sean Preston, Hamwic Multi-Academy Trust – Chief Financial Officer
(Academies – Primary)
Esther Curry, Coastal Learning Partnership (Academies – Primary)
Heather Spring, Twynham Primary (Academies – Primary)
Chris Moody, CFO – Delta Education Trust (Academies – Primary)
Chris Jackson, Avonwood Primary (Academies – Primary)
Mark Avoth, Bourne Academy (Academies – Secondary)
Michelle Dyer, Avonbourne Academies – Principal (Academies –
Secondary)
Sian Phillips, Poole High School (Academies – Secondary)
Matthew Woodville, Twynham School (Academies – Secondary)
Ben Doyle, Principal, St Peter’s School (All-Through Academies)
Russell Arnold, The Quay School – Headteacher (Alternative
Provision Academy)
Damon Parker, Woodleahouse Day Nursery (Day Nurseries
Representative)

Also in attendance: Cllr R Burton, Portfolio Holder for Children’s and Young People
Cllr Carr-Brown, Chair, Children’s Services O&S Committee

Officers in attendance: Cathi Hadley, Corporate Director, Children’s Services
Lisa Linscott, Director of Education and Skills
Tanya Smith, Head of School Planning and Admissions
Nicola Webb, Assistant Chief Finance Officer
Steve Wade, Management Accountant

42. Apologies for Absence

Apologies were received from Phil Midworth and Vicky Peters.

43. Declarations of Interest

There were no declarations of interest made on this occasion.

44. Minutes of the Previous Meeting

The minutes of the meeting held on 19 January 2026 were approved as a correct record.

The Chair noted the post-meeting note included within the minutes, which set out the modelling work undertaken following the meeting in relation to the mainstream funding formula.

45. Early Years Single Funding Formula 2026/27

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

The Schools Forum was advised that the report set out the outcome of the 2026–27 Early Years funding consultations and proposals for decision, to ensure the Council met its statutory requirements under the Schools Forum and Early Years financial regulations.

Members were informed that the Early Years Sub-Group, comprising representatives from a range of local provider types, had engaged constructively with the proposal and provided valuable input throughout its development. A key preference expressed by Members was for the local consultation to be timed to follow the Department for Education's announcement of national funding rates, while avoiding the Christmas period, to ensure that providers were able to consider the local approach with full sight of confirmed funding levels. The Department for Education confirmed the national funding formulae and hourly rates for local authorities for the 2026–27 financial year on 15 December 2025, alongside the expectation that local authorities would pass through a minimum of 97 per cent of this funding to providers.

For 2026–27, the Council had proposed to maintain stability in the Early Years Single Funding Formula by keeping the current structure unchanged. This included retaining the existing universal base rate and deprivation supplement, with no alterations to eligibility criteria or rates. Any additional funding received from the Department for Education would be fully passed on to providers through increases in the universal base hourly rates. The Special Educational Needs Inclusion Fund also remained unchanged, with no amendments to existing rates or processes. In line with national regulations, the Council would retain the maximum 3 per cent of the Early Years Single Funding Formula to fund central services necessary to administer and support the delivery of the early years entitlements.

On 12 January 2026, the Early Years Single Funding Formula consultation paper and online link for responses had been emailed to 270 childcare providers registered for early education funding within Bournemouth, Christchurch and Poole Council. The deadline for responses was 25 January 2026, and 20 per cent of providers engaged with the consultation. Overall, providers were supportive of the proposal for the 2026–27 Early Years Single Funding Formula, and the consultation response was summarised at Appendix A.

A question was raised regarding the purpose of the 3 per cent retention, and it was clarified that this supported administrative functions, including

eligibility checking, marketing of entitlements and SEND inclusion processes.

There were no further questions.

RESOLVED that:

- 1. Schools Forum recommended the proposal for the 2026–27 Early Years Single Funding Formula to the BCP Corporate Director for Children’s Services.**
- 2. Schools Forum agreed the central retention of 3 per cent to support council costs associated with the delivery of the free early years entitlements.**

46. Central Retention and De-delegation Consultation

The Head of School Planning and Admissions presented a report, a copy of which had been circulated to each Member and appears as Appendix ‘B’ to these Minutes in the Minute Book.

The Schools Forum was advised that the report had provided proposals for maintained schools in relation to the central retention of services where the Local Authority retained a statutory duty to undertake activity to support maintained schools, including both mainstream and specialist settings. The report also set out proposals for the de-delegation of services applicable to maintained mainstream schools, where schools retained the statutory duties, but greater efficiency could be achieved through central delivery by the Local Authority.

Members were informed that consultation had been undertaken with maintained schools and that responses had shown overall support for the proposals.

During discussion, a question was raised regarding the human resources element of the central retention. It was clarified that this related to statutory responsibilities for terms and conditions of staff, rather than the provision of traded human resources or payroll services.

The Chair confirmed that voting on this item applied to maintained school members only.

RESOLVED that (maintained school members only):

- Schools Forum agreed collectively the retention rates per pupil and budgets for Local Authority duties supporting maintained schools, as set out in the report.**
- Schools Forum agreed the de-delegation of funding for school improvement duties for maintained secondary schools, as described in the report.**
- It was noted that no maintained primary representative was present and therefore the de-delegation for primary schools could not be agreed.**

47. Scheme for Financing Maintained Schools 2026/27

The Management Accountant presented a report, a copy of which had been circulated to each Member and appears as Appendix 'C' to these Minutes in the Minute Book.

The Schools Forum was advised that the BCP Scheme had been updated to reflect the latest statutory guidance and proposed local financial arrangements. A short consultation had been undertaken with maintained schools.

Members were informed that consultation responses had not raised any objections or proposed amendments. One request had been received to amend the timing of budget share payments where the 28th fell on a weekend, and this had been incorporated into the Scheme.

It was also noted that the updates included minor amendments to reflect current practice, including the removal of references to outdated legislation and clarification of arrangements relating to procurement and insurance, including the Department for Education Risk Protection Arrangements. There were no further questions.

RESOLVED that (maintained school members only):

- **The Scheme for Financing Maintained Schools 2026/27 be agreed by maintained school representatives.**

48. Forward Plan

The Forward Plan was noted.

Members were advised that the next meeting would take place on 22 June 2026. The Chair also noted that feedback had been sought from Members on meeting formats, including hybrid arrangements, and that this would be reviewed outside of the meeting.

The Clerk to circulate the meeting link for the June meeting. **ACTION**

49. Dates of Future Meetings

The Forum noted the future meeting date as follows:

- 22 June 2026

50. Any Other Business

There was no further business on this occasion. The Chair thanked Members and officers for their contributions.

The meeting ended at 10.26 am

CHAIRMAN

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SCHOOLS FORUM



Report subject	Schools Forum Future Meeting Arrangements
Meeting date	22 June 2026
Status	Public Report
Executive summary	<p>The Schools Forum is a statutory body established by the local authority in accordance with the School Forums (England) Regulations 2012. It advises the authority on matters relating to the funding of schools and must operate in line with statutory guidance issued by the Department for Education (DfE).</p> <p>The Forum has, in recent years, operated successfully using virtual meeting arrangements in a hybrid environment.</p> <p>To reflect this established practice and ensure clarity and compliance with governance requirements, it is proposed that the Terms of Reference are updated to formalise meetings as being held remotely. The revised Terms of Reference ensure that arrangements continue to meet statutory expectations, including openness, transparency and public access.</p>
Recommendations	<p>It is RECOMMENDED that:</p> <p>(a) Future meetings of the Schools Forum are held remotely</p> <p>(b) The revised Terms of Reference at Appendix 1 be approved with regards to remote meetings and arrangements for public attendance</p>
Reason for recommendations	<p>To ensure that the Schools Forum continues to operate in accordance with the School Forums (England) Regulations 2012 and associated DfE guidance, whilst reflecting current practice in how meetings are conducted.</p> <p>The proposed updates provide clarity and ensure that governance arrangements remain compliant, transparent and fit for purpose.</p>

Portfolio Holder(s):	Councillor Richard Burton – Portfolio Holder for Children, Young People, Education and Skills
Report Authors	Sarah Culwick – Deputy Head of Democratic Services
Wards	Not applicable
Classification	For Decision

Background

1. The Schools Forum is a statutory consultative body required to be established and maintained by the local authority under the School Forums (England) Regulations 2012.
2. The Forum must operate in accordance with:
 - The School Forums (England) Regulations 2012; and
 - The Department for Education’s Schools Forums Operational and Good Practice Guide.
3. This framework sets out requirements relating to membership, decision-making, transparency and the conduct of business.
4. While the legislation does not prescribe the format of meetings (i.e. physical or virtual), it requires that the Forum operates openly and transparently, with appropriate arrangements for public access.
5. In recent years, the Forum has successfully operated using virtual meeting arrangements. Feedback has indicated that this approach supports member participation and improves attendance.

Department for Education Statutory Guidance

6. The Schools Forum Operational and Good Practice Guide (March 2021) states:

“The School and Early Years Finance (England) Regulations 2021 amended the Schools Forums (England) (Coronavirus)(Amendment) Regulations 2020 to make permanent provisions to enable schools forum meetings to be held remotely. This includes (but is not limited to) telephone conferencing, video conferencing, live webcast, and live interactive streaming”

Public Attendance

7. There has been limited public attendance of the Schools Forum since the formation of BCP Council in 2019, with public attending on a couple of occasions.
8. Should members of the public wish to attend a meeting of the Schools Forum the current provisions within the Terms of Reference require that Democratic Services or the Chair are notified a week in advance in order for appropriate arrangements to be made.

9. The current arrangements for public attendance would be maintained and it is proposed that should a member of the public advise that they wish to attend a meeting in accordance with the Terms of Reference (as set out in Appendix 1) then the meeting would be held in a hybrid environment whereby arrangements would be made for the public to be able to attend in person.

Summary of financial implications

10. There are no financial implications associated with this report.

Summary of legal implications

11. The Schools Forum must be constituted and operated in accordance with the School Forums (England) Regulations 2012 and associated statutory guidance issued by the Department for Education.
12. The legislation does not mandate a specific format for meetings; however, it requires that the Forum conducts its business in an open and transparent manner.
13. The proposed revisions to the Terms of Reference ensure that:
 - Meetings remain accessible to the public;
 - Appropriate notice and publication requirements are maintained; and
 - The Forum continues to operate in a legally compliant manner.

Summary of human resources implications

14. Holding meetings virtually can support equality and accessibility by reducing barriers to participation for members. Virtual meetings may assist individuals with disabilities or health conditions, caring responsibilities, or mobility challenges, and can reduce the need for travel, associated costs, and time commitments. Online meetings may also support greater flexibility and improve attendance, particularly for those who may otherwise find it difficult to attend in person. Appropriate arrangements will continue to be made to ensure meetings remain accessible, transparent, and inclusive for both members and members of the public.

Summary of sustainability impact

15. Holding meetings virtually supports sustainability by reducing travel and the associated environmental impact, including carbon emissions. It also reduces the need for physical meeting spaces and related resource use, contributing to more efficient and sustainable working practices.

Summary of public health implications

16. There are no significant public health implications arising from the proposal. Virtual meetings may support wellbeing by enabling flexible participation and reducing barriers associated with travel or health-related constraints.

Summary of equality implications

17. Holding meetings virtually can support equality and accessibility by reducing barriers to participation for members. Virtual meetings may assist individuals with disabilities or health conditions, caring responsibilities, or mobility challenges, and can reduce

the need for travel, associated costs, and time commitments. Online meetings may also support greater flexibility and improve attendance, particularly for those who may otherwise find it difficult to attend in person. Appropriate arrangements will continue to be made to ensure meetings remain accessible, transparent, and inclusive for both members and members of the public.

Summary of risk assessment

18. The risks associated with the proposal are low. Any potential risks relating to technology or engagement can be mitigated through established procedures and support arrangements. The proposal formalises existing practice and does not affect the statutory role or functions of the Schools Forum.

Background papers

Schools Forum (England) Regulations 2012

Department for Education – Schools Forum Operational and Good Practice Guide (March 2021)

BCP Schools Forum Terms of Reference

Appendices

Appendix 1 – Schools Forum Terms of Reference

Background and Statutory Authority

1. A Schools Forum is the formal consultation and decision-making body on matters relating to the funding of schools and plays a role in the discussions on the overall funding contained within the Dedicated Schools Grant. The framework was established to give schools greater involvement in the distribution of funding within the Local Authority.
2. The Forum is governed by Statutory Instrument 2012 No 2261: The Schools Forums (England) (Amendment) Regulations 2012. The Department for Education issued guidance on Schools Forums: Operational and Good Practice Guidance in March 2021.

Purpose

3. The purpose of the Schools Forum is to advise the Local Authority and in certain specific areas decide on the operation of the Schools' Budget and its distribution among schools and other bodies. The overarching areas on which schools forum make decisions on local authority proposals are:
 - de-delegation from mainstream schools budgets (separate approval will be required by the primary and secondary phase members of schools forum), for prescribed services to be provided centrally.
 - to create a fund for significant pupil growth in order to support the local authority's duty for place planning (basic need), including pre-opening and diseconomy of scale costs, and agree the criteria for maintained schools and academies to access this fund.
 - to create an optional fund for falling rolls for good or outstanding schools if the schools' surplus capacity is likely to be needed within the next three years to meet rising pupil numbers and agree the criteria for maintained schools and academies to access this fund.
 - agreeing other centrally retained budgets, including for local authority statutory responsibilities (where these relate to maintained schools only, voting is by primary, secondary, special and PRU members of the schools forum).
 - funding for central early years expenditure, which may include funding for checking eligibility of pupils for an early years place, the early years pupil premium and/or free school meals.
 - authorising a reduction in the schools budget in order to fund a deficit arising in central expenditure, or from de-delegated services, which is carried forward from a previous funding period in the 2018 to 2019 funding year the schools block is ring-fenced. Local authorities require schools forum approval in order to move up to 0.5% from the schools block to other blocks.

Membership

4. The membership of the Schools Forum is to consist of nineteen school members and five non-school members – the latter can be up to 1/3rd of the total membership. Observers can attend and participate in the meetings but will have no voting rights. The membership groups shall consist of the following representatives:

Schools Members

Primary School – Maintained*	1
Secondary School – Maintained*	1
Special School – Maintained*	1
PRU – Maintained*	1
Primary - Academy	7
Secondary - Academy	6
All-through - Academy	1
Special - Academy	1
Alternative Provision - Academy	1

Total Schools Members **20**

*At least one of the four representatives of maintained schools must be a Governor. Academies have the option to choose a local Governor or Trustee. No school can have more than 1 representative.

Non-Schools Members

Diocesan Representative	2
Early Years Provider Representatives (1 day-nursery, 1 pre-sch.)	2
16-19 provider	1
Total Non-Schools Members	5

Invited Officers and Members

Executive Council Members	2
Children's Services Lead Officer	1
Finance Lead Officer	1
Total	3

The LA Children's Services Lead Officer will be either the Director of Children's Services or their representative. The Finance Lead Officer will be the LA Chief Finance Officer or their representative. 5.

5. Schools forum members will need the skills and competencies to manage Forum business and to take a strategic view across the whole education estate whilst acting as representative of the group that elected them. Furthermore, they should be easily contactable and pro-active in raising the profile of issues and communicating decisions, and the reasons behind them, effectively. Good practice for schools forum would be to offer training to new or existing members who may benefit from this.

Clerk to the Schools Forum

6. The Clerk to the Schools Forum will be provided through the Local Authority.

Election and Nomination of Members

7. The Head Teachers Representatives, School Leadership and Governors will be elected by their respective associations.
8. Early Years Provider and 16-19 representatives will be elected by their respective peers.
9. The Diocesan members will be determined by the Catholic Diocese of Plymouth, the Salisbury Diocesan Board of Education, the Catholic Diocese of Portsmouth and the Winchester Diocesan Board of Education.
10. Nominations for membership should be sent to the Clerk, who will contact the appropriate association or body to undertake an election.
11. Nomination for membership when a Term of Office is due to end should be received 2-months prior to the date of cessation. For the reconstitution of the Schools Forum, nominations for membership should be sent to the Forum Clerk by the end of October 2023. Newly elected members will receive a welcome information pack and are able to access an induction meeting, and Forum training upon request.

Chair

12. The Chair shall be elected by members of the Schools Forum. The election shall take place at the start of the first meeting or at the first meeting following a retirement or resignation of the Chair. The election shall be conducted by the Clerk and each member shall have one vote. The Chair will represent the Schools Forum at other meetings as and when required.

Period of Office

13. The period of office for all members will commence no later than October 2023. The period of office will last for 2 years, after which the forum will be reconstituted.
14. The period of office for the Chair will commence when elected by the membership. The period of office will last for 2 years, after which the post will be re-elected; the same representative can stand for re-election.
15. A member shall remain in office until:
 - They cease to hold the office by virtue of which he or she became eligible for appointment to the Forum

- The term of office as a member comes to an end
- They resign as a member

16. Members of the existing Schools Forum are allowed to seek re-election should they still be eligible. Where a vacancy occurs, there shall be a new appointment to fill the unexpired term of office. In the event of no member of a group standing for nomination, the Chair may obtain agreement from the Schools Forum members to co-opt an appropriate person.

Non-Attendance

17. If a member is not in attendance for 3 consecutive meetings, the Chair shall ascertain the reasons and take Chair's action to consult with the relevant group regarding a replacement. ,

Substitutes

18. Where a member is unable to attend the meeting he or she may draw to the attention of the Clerk or the Chair 48 hours in advance, a substitute who is attending from their group.

19. In the event of a matter being put to a vote, the substitute will have a vote. Where possible, formal substitutes should be elected, and should be in a position to represent the group of schools/ providers of the member they are substituting for. The Clerk should be made aware of any formal substitutes elected by the various groups.

Observers

20. The meetings of the Schools Forum are open meetings and members of the public may attend as observers. Meetings may be held in person, remotely, or on a hybrid basis. Where no requests are received from members of the public to attend, meetings will ordinarily be held remotely.

21. Where a member of the public requests to attend, appropriate arrangements will be made, including provision of a hybrid meeting where required. Observers are requested to notify the Clerk or the Chair of their intention to attend at least one week in advance of the meeting date so that appropriate arrangements can be made.

22. Observers may take part in the meeting with the permission of the Chair. The Chair's decision will be final.

23. Members of the Schools Forum may request the Chair to exclude observers from discussion of confidential items. Such items shall be clearly indicated in advance on the agenda for the meeting. Papers relating to such items shall be labelled confidential.

24. In the event of a matter being put to a vote, observers will not have a vote.

Meetings

25. Normally a Schools Forum meets four times a year. Meetings may be held in person, remotely, or on a hybrid basis. Meetings of the Schools Forum will aim to follow this routine, but the exact number of meetings required will be determined by the membership and the business to be discussed.
26. Dates of the Schools Forum meetings shall be agreed with the membership, normally before the start of a new academic year.
27. Extra ordinary meetings of the Schools Forum may be called by the Chair or by 40% of its membership.
28. The quorum of a meeting will be 40% of the Schools Forum membership (ten members).
29. Members must declare any interest associated with any item under discussion related directly to the organisation they represent.
30. Notes of the meetings will be made available to the public as soon as reasonably practicable following each meeting. They will be agreed at the next Schools' Forum meeting.
31. With regard, to sub-committees or working groups, any advice formally passed to the Local Authority must be approved by the Schools Forum as, a whole.
32. Costs of the Schools Forum will be charged to the Schools' Budget.

Voting

33. Only members of the Schools Forum or their nominated substitutes shall have a vote. The Chair will have a second and casting vote if required. Observers are not eligible to vote.

Urgent Business

34. Should urgent business requiring action be required between meetings the Chair shall contact all members by e-mail. The Chair shall then give the Local Authority a decision based upon the responses received. This shall be fully reported to the next Schools Forum meeting.

Remit

35. The Local Authority has a duty to consult with the Schools Forum on:
 - Schools' Funding Formula: Any proposed changes to the Schools' Funding Formula in relation to factors and criteria that have been taken, into account or methods, principles and rules that have been adopted, together with the financial effect of any such change. The consultation will take place in sufficient time to allow any views expressed to be considered in determining the formula and schools' budget shares before the beginning of the financial year

- **Contracts:** At least one month prior to the issue of invitations to tender, if applicable the Local Authority will consult the Forum on the terms of any proposed contract for supplies or services to be paid out of the Schools' Budget where the estimated value of the contract is considered material
- **Financial Issues:** The Schools Forum will also be consulted on the Schools' Budget in relation to the following:
 - The arrangements to be made for the education of pupils with Special Educational Needs
 - Arrangements for the use of the Pupil Referral Unit and the education of children otherwise than at school
 - Arrangements for Early Years education
 - Prospective revisions to the Scheme for Financing Maintained Schools
 - Allocation of the Individual Schools' Budget to schools
 - Administrative arrangements for the allocation of central Government grants paid to schools via the Local Authority
 - Any other appropriate financial issue

36. The Forum will monitor and assess the quality and value-for-money of services purchased by/ for schools. It may also be provided with or request reports on other items deemed a priority to its remit.

Sub-Groups

37. An Early Years sub-group will meet as and when required to develop the Early Years Formula. The membership will consist of Early Years providers and officers. The subgroup will make recommendations to the Schools Forum.

38. Other sub-groups can be formed to investigate or develop further issues as and when required by the Schools Forum.

39. The membership of any sub-group does not have to consist solely of Schools Forum Members, e.g., the Early Years sub group.

Establishing School Representation

40. The table below provides a representation of how the proportional split of Primary/ Secondary, Maintained/ Academy has been achieved, with an accompanying note on the methodology.

LA Area	Maintained Mainstream		Academy Mainstream			Special Schools and PRU		Total	%
	Primary	Secondary	Primary	Secondary	AT	Maintained	Academy		
Total	3,371	2,933	23,701	19,043	2,779	636	428	52,891	100%

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Note: Mainstream pupil count includes years R – 14 inclusive as per the weighted average NOR across the period April 2022 to March 2023. Special pupil numbers are as per the special places agreed with schools for the same period, and academies for the 2022-23 academic year. The number of representatives was determined by rounding down to the nearest integer $NOR / 2800$, which if equalling 0 then setting at 1. Middle school primary phase pupils are considered against the primary NOR, while their secondary pupils contribute towards the secondary NOR.

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SCHOOLS FORUM



Subject	Dedicated Schools Grant (DSG) Outturn 2025-26
Meeting Date	22 June 2026
Executive Summary	<p>The report considers the end of year position for the DSG budget 2025-26. The outturn is an in-year funding gap of £66.6m. This is £9.1m more than the budget, but an improvement compared with the quarter three forecast.</p> <p>The budget was set with the expectation that the innovation fund would start to have impact in reducing the demand for education health and care plans (EHCPs) alongside the creation of new SEND places in mainstream schools through capital investment to limit the use of higher cost independent provision. There is delay in both initiatives and the SEND reforms announced by government during the year have further fuelled demand. The result has been greater use than budgeted of high-cost independent school places, alternative provision and bespoke arrangements for children and young people unable to attend any school setting.</p> <p>The trajectory of the accumulated deficit has therefore continued a significant upward path from £113.3m for March 2025, to almost £180m for March 2026. This deficit is carried forward by the council in a specific negative reserve by a statutory override that suspends the normal accounting practice.</p>
Recommendations	To note the contents of the report.
Reasons for Recommendations	To update school's forum on the DSG financial position
Portfolio Holder(s):	Councillor Richard Burton – Children and young People
Corporate Director	Cathi Hadley
Report Author (s)	Nicola Webb, Assistant Chief Finance Officer nicola.webb@bcpcouncil.gov.uk
Wards	Council-wide
Classification	For Information

Summary DSG Outturn 2025-26

1. The DSG accumulated deficit has grown rapidly from £4.6m in March 2020 to £113.3m over the five years to March 2025. The deficit has increased to £179.8m for March 2026 as demand for high needs support continues to outstrip the local capacity and with low DSG funding growth. The early years and schools block have underspent and these provide some offset for the £71.6m outturn funding gap for high needs.
2. The budget was set with a £57.5m funding gap due to excess high needs expenditure. The outturn is an overspend of £9.1m which means the actual funding gap is £66.6m. Table 1 below summarises the DSG 2025-26 outturn for each funding block, with narrative following.

Table 1: Summary DSG Outturn 2025-26

Block	Early Years £000's	Schools £000's	Central Services £000's	High Needs £000's	Total DSG £000's
Income					
Budget	-53,549	-283,535	-2,174	-65,708	-404,967
Actual	-50,836	-283,535	-2,174	-65,174	-401,720
Variance	2,714	0	0	534	3,248
Expenditure					
Budget	53,549	283,535	2,174	123,211	462,470
Actual	47,889	283,403	2,173	136,770	470,234
Variance	-5,661	-133	-1	13,559	7,764
Net Overspend / - Underspend	-2,947	-133	-1	14,093	11,012
Prior year funding adjustment for early years					-1,932
Net overspends					9,080
Budgeted funding gap					57,500
Actual funding gap					66,580

3. A detailed budget monitoring statement is in the appendix.

DSG Income

4. The outturn includes a net reduction in funding for 2025-26 of £3.2m. This is mainly attributable to lower take-up of the early years free entitlements than budgeted across all age groups. The early years funding will be finalised in summer 2026, with any variance from the above estimate reflected in the DSG outturn for 2026-27. The reduction in the high needs block of £0.5m is from the import / export adjustment in summer 2025 to reflect the cross-border flow of pupils as previously reported.

Early Years Block

5. The early years budget was set to be balanced with the reduced take-up also reflected in lower expenditure than budgeted across all age groups. The early years single funding formula has allocated less (in total and as a proportion) through the deprivation supplement than estimated. The impact of the reduced proportion has been reflected in

the funding formula for 2026-27. In addition, allocations of SEND top up grants and disability access fund were also less than expected along with the contingency being unused. This was a further transition year for the extended entitlement for working parents with trends not yet established for DfE estimates of take-up and funding and similarly for the council.

Schools Block

6. The mainstream schools funding formula was paid to mainstream schools and recouped by the ESFA according to the formula set in January 2025. There is a small underspend from business rates refunds relating to prior years which are still charged to the council's DSG. There were no growth fund payments relating to 2025-26 but a missed allocation for 2024-25 was paid leaving £0.1m of the growth fund unspent.

Central Schools Services Block

7. The central schools service block funding was allocated to central council budgets after allowing for the DfE deduction for copyright licences.
8. The historic commitments funding was almost fully restored to previous levels following the annual submission of evidence to the DfE that commitments were not reducing in 2025-26. This level of commitment funding has been confirmed in the March updated allocations for 2026-27 after undertaking the same evidence process.

High Needs Block

9. The high needs expenditure for 2025-26 is significantly ahead of budget by £13.6m.
10. As fewer special school places or resource basis were created than budgeted there is an underspend for place funding of £3m. There has also been delay for the inclusion fund activities with £1m unspent. This has been carried forward into 2026-27 and included in the budget as reported at the January 2026 meeting. The inclusion leads are now in place, and the expanded special school outreach programme will be ready for a September 2026 start.
11. The lack of sufficiency in local provision, the further escalation in demand and increase in average costs means that the cost of the independent special school sector has grown to £8.5m beyond the budget to almost £40m of actual expenditure. Above budget allocations of £8.5m to £42m were provided for pupils remaining in mainstream schools and within state funded special schools. There is some offset from post school providers being £2.8m below budget at £9.2m. DSG funding allocated to each of these three expenditure lines at outturn has grown approximately threefold over the last six years since the first year of BCP in 2019/20.
12. Bespoke provision and therapies were ahead of budget by £3.6m to almost £18m of expenditure on pupils and young adults unable to attend any school or education setting. These costs are now more than seven times the level of 2019-20 when only £2.5m was spent.
13. In comparison with the increases in expenditure noted above since 2019-20, the DSG high needs block funding has increased by only 66% from £38.9m to £64.5m in 2025-26 with this unchanged for 2026-27, other than to include subsumed pay grants to largely be passed on to schools.

School Balances Outturn

14. Reporting of maintained school balances to schools forum is required but the position across all schools should be presented for understanding the financial picture across all state funded schools in the local area. It is accepted that there is unknown context underlying individual school levels of reserves with the information presented in summary for overall context on the current financial health of schools generally.

Academies

15. The latest information available for academies is for 31 August 2025. Overall, balances have increased by 2% from August 2024 and the latest balances overall equate to 12% of formula funding but with 20 (24%) of academies being in deficit.

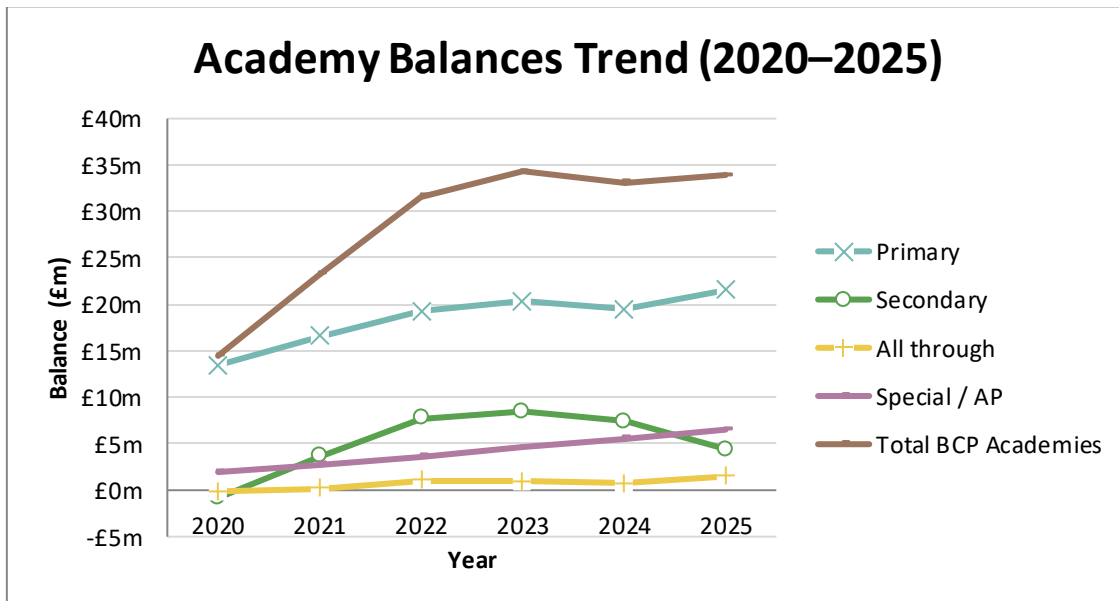
Table 2: Summary Academy Balances at August 2025

Academy Balances	Aug 2024	Aug 2025	Annual Change	Formula / cost	In Surplus	In Deficit
	£000's	£000's	%	%	No.	No.
Infant/First	2,280	2,704	19%	13%	11	4
Primary	12,145	13,594	12%	19%	23	7
Junior	5,004	5,224	4%	21%	11	0
Primary Phase	19,429	21,522	11%	19%	45	11
Secondary	7,383	4,387	-41%	4%	13	7
All through	746	1,479	98%	6%	2	2
Specialist	5,519	6,518	18%	40%	4	0
Total BCP	33,078	33,905	2%	12%	64	20

16. Where the published accounts of MATs do not list individual school balances, the latest published position plus in-year movements each year from the school benchmarking website have been used. When tested for academies where accounts information is available, this method has produced reliable results. Some MATs are pooling reserves, so amounts recorded for individual schools may not be available for spending or a deficit needing to be recovered by a BCP school.
17. The mainstream formula proportion for 2025-26 has been used to provide context for the scale of unspent mainstream school funding but accepting that schools have other funding sources that may be held in reserves at the year-end. In the case of specialist providers, the proportion of annual costs held in reserves has been used.
18. Despite continued falling rolls in the primary phase, these academies have healthy reserves in total with five schools with balances over £1m. However, 20% of schools in the phase have a deficit, with the largest being £0.5m.
19. Secondary schools have the lowest overall proportion of funding held in reserves but with some significant surpluses (five academies with over £1m, the highest being £4 million) and four schools serving less affluent communities with deficits of over £1m. The 41% reduction compared with August 2024 is attributable to academies using their reserves (some spending on capital projects) as well as deficits growing further with only five academies showing a positive movement in reserves over the 2024-25 academic year.
20. The specialist providers have the highest level of funding in reserves at 40% of annual costs with three academies with reserves of over £1m. Reserves have been growing each year with August 2025 being an increase of 18% compared with the previous year.

21. The trend of academy balances over the last six years is shown in the graph below. Balances more than doubled between August 2020 and 2023 from £14m to then stabilise at around £34m in the years following.

Figure 1:



Maintained Schools

22. The latest information for maintained schools is at 31 March 2026. Overall revenue balances have reduced with only three schools (21%) having increased balances over the financial year.
23. The overall proportion of funding held in reserves is 10% but three schools (21%) are in deficit, both proportions being similar compared with academies.

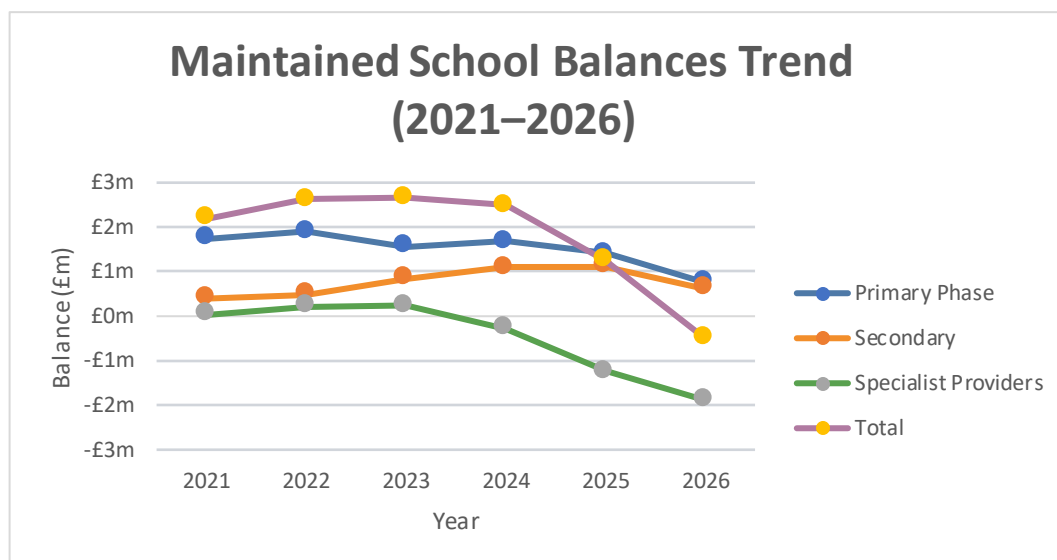
Table 3: Maintained School Balances

Maintained School Balances	March 2025	March 2026	Annual Change	Formula / Cost	In Surplus	In Deficit
	£000's	£000's	%	%	Number	Number
Primary Phase	1,400	756	-46%	5%	9	1
Secondary	1,106	632	-43%	10%	1	0
Specialist	-1,251	-1,888	51%	-5%	1	2
Total	1,255	-500	-38%	10%	11	3

24. The significant reduction in total balances is due to the further growth in an existing special school deficit and a new primary phase deficit emerging during the year.

25. The trend for the current maintained school revenue balances over the last six years is shown in the graph below. Balances overall increased up to 2023 but then have declined sharply, in large part due to the small number of growing deficits. These schools are being supported with their deficit recovery plans.

Figure 2:



Summary Financial Implications

26. A summary of the DSG outturn for 2025-26 in the context of the accumulated deficit is set out in the table below:

Table 4: Summary position for dedicated school's grant March 2025-2027

Dedicated Schools Grant	£m
Accumulated deficit 1 April 2025	113.3
Prior year additional funding – early years	(1.9)
Budgeted high needs funding shortfall 2025-26	57.5
High needs funding reduction 2025-26	0.5
High needs overspend 2025-26	13.5
Other block underspends	(3.1)
Accumulated deficit 31 March 2026	179.8
Budgeted high needs funding gap 2026/27	95.7
Potential accumulated deficit 31 March 2027	275.5

27. The SEND reform plan included as a separate item on the agenda is designed to deliver system-wide improvements with a small financial impact expected in 2026-27. If the financial outcomes of the plan are achieved, then the potential deficit shown above for March 2027 will be lower.
28. The final Local Government finance settlements for 2026-27 included the details of government financial support available for the historic and still accruing DSG deficit up to March 2028. This includes:
- A new high needs stability grant, to cover 90% of the deficit as at the 31 March 2026. This grant will be subject to the council submitting and securing government approval of a local SEND reform plan. This plan is to reflect the aspirations in the February 2026 Schools White Paper. If agreement is

reached the grant will be paid during the autumn of 2026. It will be applied to the accumulated deficit balance on the 31 March 2028.

- b. An expectation that similar support will be given for further deficits that will arise in 2026-27 and 2027-28, although it was recognised that this support would not be unlimited.
29. In the meantime, the current accumulated deficit of £179.8m is being 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 found). Government has confirmed that the statutory override will cease on the 31 March 2028.
30. The advice to local authorities from government is that they need to plan to be able to meet the cost of the residual deficit from their own resources in 2028-29. This includes setting aside appropriate reserves in the preceding years. If the council also receives 90% of its forecast accruing DSG deficits in 2026-27 and 2027-28 then the council will need reserve funding of £38m in 2028-29 to specifically cover the remaining deficit at March 2028.
31. The government indicated in the November 2025 Budget Statement that there should not be further deficits beyond March 2028. The Statement included that from 2028-29, central government support to councils for SEND will be at a level that means further deficits need not accrue. Funding for that will be absorbed within overall government funding and not be taken from schools funding, with details to be confirmed in the 2027 Spending Review for financial year 2028-29.

Legal Implications

32. 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.
33. It is the authority's responsibility to manage the DSG as a whole, rather than block by block. The Local Authority (Capital Finance and Accounting) (England) (Amendment) Regulations 2020 (updated 2022), made by the Ministry of Housing, Communities and Local Government, set statutory rules for how a DSG deficit is to be calculated, and that the whole of it is to be put in an unusable reserve. The definition of how the deficit is to be calculated includes any surplus from individual blocks. Separate reserves for blocks in surplus cannot be held.

Summary of human resources implications

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

Summary of sustainability impact

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

Summary of public health implications

36. 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

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

Summary of risk assessment

38. The outturn is prepared based on the best estimates available to close the financial statements. Any variations to these will impact in the 2026-27 financial year.

Background Papers

39. The DSG budget for 2025/26 was set out and discussed in the Schools Forum meeting in January 2025. The link to the quarter three budget monitoring position in the January 2026 School's Forum papers is below:

[Welcome to BCP Council | BCP](#) item 37

Appendix

Presentation of detailed DSG outturn budget variances for 2025-26.

Appendix – 2025-26 DSG Budget and Outturn	Early Years £000's	Schools £000's	Central Services £000's	High Needs £000's	Total £000's	Total £000's	Variance £000's
Aged under 2	-16,389				-16,389	-15,161	1,229
Aged 2	-14,021				-14,021	-13,402	620
Aged 3 & 4	-22,525				-22,525	-21,482	1,044
Pupil Premium	-384				-384	-563	-179
Disability Access Fund	-229				-229	-229	0
Prior Year					0	-1,932	-1,932
School Block NFF		-280,709			-280,709	-280,709	0
Premises		-1,930			-1,930	-1,930	0
Grow th Fund NFF		-2,133			-2,133	-2,133	0
Block Transfer		1,237		-1,237	0	0	0
High Needs Block				-64,472	-64,472	-63,938	534
Central School Services Block			-2,174		-2,174	-2,174	0
Total Funding	-53,549	-283,535	-2,174	-65,708	-404,967	-403,652	1,316
Providers – aged under 2	14,959				14,959	12,941	-2,018
Providers – aged 2	13,166				13,166	12,108	-1,058
Providers – aged 3 & 4	20,867				20,867	19,378	-1,489
Providers SEN top up grants	2,257				2,257	1,415	-842
Early Years Pupil Premium	384				384	604	220
Disability Access Fund	229				229	108	-121
Contingency	352				352	0	-352
Early Years LA duties	1,335				1,335	1,335	0
Mainstream Schools Formula		283,385			283,385	283,369	-16
Grow th Fund		150			150	33	-117
School Admissions			422		422	422	0
Servicing Schools Forum			9		9	9	0
Ex ESG Services			1,092		1,092	1,114	22
Commitments - retirements			16		16	16	0
Commitments - ASD Base			275		275	274	-1
Licences Purchased by DfE			360		360	338	-22
Place Funding				18,518	18,518	15,515	-3,003
Top up Funding - State Sector				33,828	33,828	42,314	8,486
Top up Funding - INMSS				31,237	31,237	39,866	8,629
Top up Funding - Post School				11,982	11,982	9,171	-2,811
Top up Funding - Pre schools				374	374	267	-107
Top up Funding - Excluded/AP				4,500	4,500	5,103	603
Commissioned Services				2,809	2,809	2,096	-714
Private Hospital Education				100	100	65	-35
Bespoke SEN /Therapies				14,238	14,238	17,879	3,641
Support for Inclusion				200	200	133	-67
Teachers Pay & Pension Grants				2,000	2,000	1,821	-179
Inclusion Fund				1,237	1,237	165	-1,072
Early Years Central SEN support				1,266	1,266	1,272	7
Sensory Impaired Service				922	922	1,103	181
Total Expenditure	53,549	283,535	2,174	123,211	462,470	470,234	7,764
Deficit budgeted / actual	0	0	0	57,502	57,502	66,582	9,080
Deficit brought forward					113,256	113,256	
Deficit carried forward					170,759	179,838	

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SCHOOLS FORUM



Report subject	BCP Experts at Hand Model
Meeting date	22 June 2026
Status	Public Report
Executive summary	This report provides Schools Forum with an overview of the proposed BCP Experts at Hand partnership model, developed to strengthen early, inclusive and needs-led support for children and young people with SEND across schools and settings. The model is rooted in co-production with children, young people, families, practitioners and partners, and is designed to build confidence and capability within mainstream settings through timely access to specialist expertise, coaching, training, consultation and practical support. It aligns with the Graduated Approach to Inclusion and the emerging cluster-based targeted funding model, creating a coherent locality-based system focused on prevention, early intervention, reduced escalation and improved outcomes.
Recommendations	<p>It is RECOMMENDED that:</p> <p>That Schools Forum notes the development of the BCP Experts at Hand partnership model and its intended alignment with the wider SEND reform programme, the Graduated Approach to Inclusion and the targeted funding cluster model, and provides feedback from the perspective / remit of a Schools Forum.</p>
Reason for recommendations	To provide Schools Forum with early sight of the model and to support shared understanding of how specialist expertise, cluster working and funding arrangements will come together to strengthen inclusive practice, improve consistency of support and reduce reliance on statutory escalation over time.

Portfolio Holder(s):	Councillor Richard Burton, Portfolio Holder for Children and Young People
Corporate Director	Cathi Hadley, Corporate Director for Children's Services
Report Authors	Lisa Linscott, Director of Education and Skills Lisa McDonald, SEND and Inclusion Consultant
Wards	Council-wide
Classification	For information

Background

1. The Experts at Hand model has been developed as part of BCP's wider SEND reform work. It responds to feedback from children and young people, families, schools, settings and practitioners, who have consistently highlighted the need for earlier, more accessible, joined-up support that helps needs to be understood and met in the places children learn and belong.

BCP Experts at Hand partnership model

2. The model will provide a place-based, multidisciplinary offer across BCP clusters, with Inclusion Leads acting as a consistent point of contact for schools and settings. Support will include coaching, training, modelling, consultation, specialist advice and targeted activity, underpinned by data, local intelligence and clear governance arrangements. The aim is to build long-term capacity within schools and settings, rather than creating dependency on specialist services.

Options Appraisal

3. The preferred approach is to implement the Experts at Hand model as a cluster-based partnership offer aligned to the Graduated Approach to Inclusion and targeted funding arrangements. This provides the strongest opportunity to connect specialist expertise, school leadership, local data and funding decisions within one coherent system. Alternative approaches, such as continuing with more separate referral-based services, would be less likely to provide the early, preventative and consistent support required.

Summary of financial implications

4. The attached model sets out proposed investment to strengthen staffing, digital infrastructure, administration, data analysis and transformation capacity. Further financial modelling and alignment with the High Needs Block and targeted funding arrangements will be required as implementation progresses.

Summary of legal implications

5. There are no direct legal decisions arising from this information report. The model supports the Council and local area partnership in meeting duties relating to SEND, inclusion and access to education. Legal advice will be sought as required during implementation, particularly where commissioning, data sharing or governance arrangements require formal agreement.

Summary of human resources implications

6. The model includes strengthened staffing across inclusion, educational psychology, speech and language therapy, occupational therapy, seconded school and setting practitioners, administration and data support. Implementation will require clear role design, recruitment, induction, training and ongoing workforce development to support consistent practice across clusters.

Summary of sustainability impact

7. No significant negative sustainability impacts are identified at this stage. A locality-based model may reduce unnecessary travel by bringing support closer to schools and settings and making greater use of digital tools for requests, monitoring and communication where appropriate.

Summary of public health implications

8. The model is expected to support positive health and wellbeing outcomes by promoting early intervention, stronger inclusive practice, improved engagement, reduced escalation and better links with health partners, including speech and language therapy, occupational therapy, CAMHS and Mental Health Support Teams.

Summary of equality implications

The model is intended to improve equity of access to support by using data, local intelligence and contextual information to identify where help is most needed. It has a strong focus on inclusion, belonging and reducing barriers for children and young people with SEND. Equality implications will need to be kept under review as the model is implemented.

Summary of risk assessment

Key risks include insufficient capacity to meet demand, inconsistent implementation across clusters, delays in recruitment, and the need to demonstrate impact clearly. These risks will be mitigated through phased implementation, clear governance, data-informed monitoring, defined request and triage processes, and regular reporting through inclusion and SEND governance arrangements.

Background papers

BCP Experts at Hand Partnership Model.

Appendices

BCP Experts at Hand Partnership Model.

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Bournemouth, Christchurch and Poole

APPENDIX 4: Experts at Hand

39



PARENT CARERS TOGETHER
Bournemouth Christchurch Poole



Bournemouth Christchurch and Poole – Our Experts at Hand Partnership Model



BCP Inclusion Support Partnership

Building belonging, growing confidence, thriving together

Contents

1. Partnership Co Production and Collaboration
2. The BCP Inclusion Support Partnership Model
3. Our Support Eco System
4. Visual Delivery Model
5. Our Menu of Support
6. Aligning with the Targeted Funding Cluster Model
7. Requests for Help
8. Allocation based on data and contextual information
9. Governance and Monitoring
- 10.3 Year Overview plan
11. Strengthened Staffing

1. Partnership Co Production and Collaboration

Through our co production events our **children and young people** told us that having ‘experts’ is a good idea because it brings the right help, at the right time, into the places they feel most comfortable. They talk about valuing support that is early, consistent and built into their everyday experience, rather than something they have to wait for or access separately. They also highlight that they learn best when staff understand them, adapt learning, and understand the right tools, space and relationships.

Children and young people emphasise the importance of feeling safe, included and listened to, with adults who take time to understand their needs and respond quickly before things get harder. Access to specialists in school is seen as positive, especially when it helps staff understand them better and improves the support they receive day to day.

Our families told us that they want an “Experts at Hand” service that is accessible, consistent, and genuinely collaborative, bringing specialist expertise directly into mainstream settings while recognising parents as key partners. They value joined-up, holistic support—including links to health, social care, and the voluntary sector—alongside clear, transparent pathways and easily accessible information. Early intervention, strong support at transition points, and help with preparing for adulthood are critical. Families want experienced, well-trained practitioners who listen, build trusting relationships, and remain consistent, with flexibility to adapt support when needed. There is a clear priority on inclusive practice in schools, with well-trained staff, sufficient capacity, and a focus on understanding each child as an individual to avoid escalation.

Our practitioners want an Experts at Hand model that is preventative, person-centred, and built on trust, with the child at the heart and a focus on meeting need rather than diagnosis. They emphasise the importance of visible, consistent practitioners working alongside schools and families, creating a shared “village” approach with strong partnership and common language across education, health, and care. The service should offer joined up, easily accessible support through a coordinated hub or single front door, bringing together a wide range of expertise and enabling early, flexible intervention without reliance on formal diagnosis. Practitioners also highlight the need for system-wide consistency in inclusive practice, strong workforce development, and sufficient capacity, alongside effective use of shared data and clear pathways. Overall, they want a service that builds local capability, empowers schools and families, and delivers timely, collaborative support that reduces escalation and improves outcomes.

Overall, the message is clear: support is most effective when it is joined-up, responsive, flexible and grounded in strong human relationships, ensuring every child and young person succeeds, belongs and feels confident in their journey. **This shared vision is the golden thread running through our Experts at Hand partnership model.**

1. The BCP Inclusion Support Partnership Model

Our model is a place-based, early intervention approach rooted in our commitment in BCP to inclusive, thriving communities. We want to work alongside schools and settings at the earliest stage, strengthening inclusive practice through our Graduated Approach (www.bcp-gati.com) so children and young people with SEND are identified early, supported quickly, and enabled to succeed.

At its heart, our model is about building confidence and capability within our settings & schools, ensuring needs are met where children are, when they arise. By doing this, we reduce escalation, lessen reliance on statutory services, and create a more responsive, sustainable system that works for families, settings, and partners across BCP. To get this right, we must have a deep and nuanced understanding of our schools and communities, recognising the diversity of need, background and experience across BCP. For example, we know that our local area is becoming more ethnically diverse, with around 18% (70,600) of residents from an ethnic minority background. This diversity is even greater among younger people; 27% (14,600) of pupils in BCP schools (2023/24) identify as non-White British. SEND prevalence is highest amongst pupils from White and Black Caribbean, Gypsy Roma, White British and White Irish ethnic groups. This is an important consideration when developing our model and ensuring its success.

As a partnership we want to build long-term capability within schools, not dependency.

- Focus on “working alongside” staff
- Strengthening confidence and skills in meeting diverse needs
- Embedding sustainable, whole-school approaches

The BCP *Experts at Hand* offer has been developed through a strong co-production approach, ensuring that the voices of practitioners, children and young people, parents and carers, and multi-agency partners are central to its design and delivery. This collaborative process enables the offer to be responsive, relevant, and grounded in lived experience and frontline practice.

Central to this approach is a strong emphasis on building the skills, confidence and capacity of those who work most closely with children and young people, rather than delivering support directly to individuals. Through coaching, training, modelling and consultation, expertise is shared in a way that empowers practitioners within schools and settings to better understand and meet need as part of their everyday practice. This creates a sustainable

model of support, where knowledge is embedded, staff feel equipped and confident, and positive impact extends beyond individual cases to benefit whole cohorts over time.

At its core, the model strengthens early help through a quick-response function, providing timely access to expertise that prevents escalation and wraps around settings to support children and young people at the earliest point of need. It operates across both universal and targeted levels, ensuring that support is accessible to all while also prioritising those with emerging or complex needs.

The offer is underpinned by structured working groups and delivered by multi-agency practitioners, bringing together a breadth of expertise across education, health, and wider services. This integrated approach enhances consistency, builds confidence in settings, and ensures that schools and practitioners can access specialist advice without delay.

The design is informed by needs-based data, including insights and intrinsic links to CAMHS and MHST, ensuring alignment with local mental health and wellbeing priorities. By adopting a needs-led and equity-focused approach, the model prioritises fair access to support and addresses variations in need across different communities and settings. Included in this model will be two Advanced SALT Practitioners who will work across the ICB Cluster to provide clinical oversight, support consistent practice and ensure quality of delivery.

Importantly, our Experts at Hand extends expertise across schools and wider settings, building capacity within the system rather than creating dependency. This supports a sustainable model of inclusion and early intervention, empowering practitioners to respond effectively while ensuring that young people receive the right support, at the right time, in the right place.

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EAH Ask	How this will be delivered
<p>Delivered by a multidisciplinary team with specialist expertise</p>	<p>‘Expert’ representation across Education, Health and Care, including secondments from schools and settings, and co delivery of support from children and young people (CYP) and their families. This reflects a genuinely collaborative partnership, recognising and valuing expertise from across services, settings and lived experience to support shared decision-making and improved outcomes.</p>

<p>Accessible through a clear, consistent request pathway</p>	<p>One point of contact for SENCOs and school leaders through the Inclusion lead team model across clusters.</p> <p>One digital platform for referrals featured on www.bcp-gati.com with one triage approach for 'expert' allocation linked through to a clear monitoring and evaluation system.</p>
<p>Responsive, school-based support with defined timescales</p>	<p>We will ensure responsive, school-based support through a clear and accessible model that prioritises timely intervention. A swift 'soft triage' process will enable needs to be identified and addressed within defined timescales. Each setting will have a consistent point of contact who knows their context and can provide tailored support. Requests for help will be simple and accessible, underpinned by a proactive approach so that support is offered without schools needing to formally request it, ensuring timely, informed, and effective responses.</p>
<p>Close partnership with SENCOs, senior leaders and class teachers</p>	<p>Grow our own 'experts': SEND Lead Practitioners from settings and schools will be seconded across clusters to enhance the offer and support development of universal support. The secondments will be for two days per week to ensure we retain expertise in our settings and can alternate across the academic years to continue to grow a wider group of inclusion lead practitioners.</p> <p>In addition, we will strategically review themes and needs across the cluster, drawing on a range of data, professional dialogue, and school-level insight, to identify both common priorities and emerging challenges. This will ensure that cohesive, evidence-informed whole-cluster support, training, and guidance are systematically planned, appropriately targeted, and effectively implemented to strengthen inclusive practice and improve outcomes for all learners.</p>

The foundation of the delivery model is rooted in the BCP Graduated Approach to Inclusion (GATI), accessible via www.bcp-gati.com. This platform provides a comprehensive baseline of support, guidance, live examples, case studies, and a clearly defined Ordinarily Available Provision (OAP) framework. It ensures that all partitioners have a shared understanding of expectations and access to consistent, high-quality resources to inform inclusive practice.

All schools and settings are expected to engage proactively with this framework, working diligently to develop and evidence a robust and effective ordinarily available offer. Establishing this strong baseline is essential to ensure consistency, accountability, and high standards of inclusion across BCP. This solid foundation enables the delivery team to build and strengthen the wider Expertise at Hand (EAH) model, ensuring universal, targeted and targeted+ support is layered effectively on top of a secure, embedded everyday provision.

The BCP Experts at Hand delivery model is designed to provide a coherent, equitable, and high-impact system of support across all schools and settings. Our model focuses on cluster level, whole schools and group level delivery.

The core team will be led by a Team Lead for BCP Inclusion Leads, supported by five Inclusion Leads. Each Inclusion Lead will cover two of the 10 clusters across BCP. Early Years Area SENCos will be linked to clusters in line with their geographical scope, ensuring alignment between early years settings and school-age provision to support effective transition. There will also be Post 16/FE allocation to the Inclusion Team Lead, who will work closely with the Education Effectiveness lead for pathway planning to ensure support is secured in this space. This structure ensures consistent coverage, clear accountability, and strong locality-based relationships from 0-25.

Inclusion Lead Role Approach - Inclusion Leads will primarily operate at whole cluster level to identify trends, analyse emerging themes, and respond strategically to areas of need. They will provide targeted training support, high-quality guidance, and practical strategies, with a clear focus on strengthening teaching and learning, developing an inclusive curriculum, and building system-wide inclusive leadership. They will ensure that best practice is shared effectively across schools, drawing on successful case studies to promote evidence-based approaches and consistently improve inclusive classroom practice. Through this work, Inclusion Leads will support leaders and practitioners to embed inclusive pedagogy, adapt curriculum design to meet diverse needs, and develop strong, sustainable leadership of inclusion across the system.

At an individual school level, Inclusion Leads will offer more focused support through whole-school inclusion audits, tailored training, and ongoing coaching for SENCos and senior leaders. They will play a key role in building leadership capacity for inclusion, supporting schools to develop and implement robust, sustainable SEND and inclusion strategies. This will include designing and mapping a comprehensive CPD programme that reflects both cluster-wide priorities and individual school needs, ultimately driving consistent, high-quality inclusive practice across all settings.

Within each cluster, the Inclusion Lead will be complemented by two seconded school leaders with strengths based upon the distribution of phase within the cluster, creating a skilled and practice-informed network of 10 secondees across the system. This combination of system leadership and current setting and school-based expertise strengthens relevance, credibility, and practical application in day-to-day educational contexts. We aim to extend this further by adding lead practitioners from both Early Years and Post 16/FE and the Best Start Inclusion Practitioners as the model progresses.

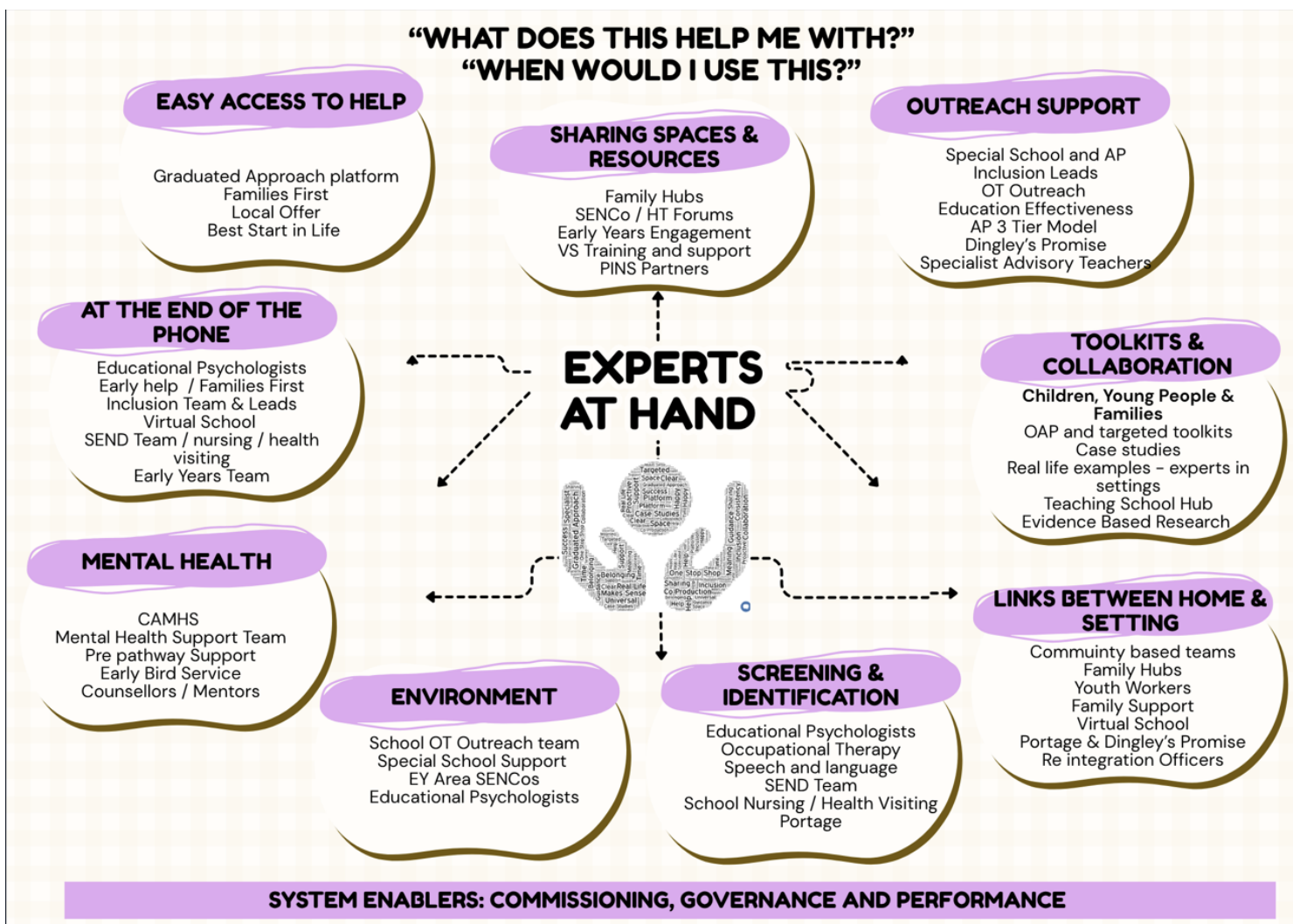
Each cluster is further enhanced by the dedicated involvement of one Educational Psychologist, Occupational Therapy and a Speech and Language Therapist, ensuring access to specialist knowledge that supports both universal and targeted provision. This multidisciplinary approach enables early identification, effective intervention, and the development of inclusive practices across settings. There will be a structured programme of training for identified experts to ensure a consistent approach, build professional strength, and support effective collaboration. This programme will focus on developing shared understanding, enhancing expertise, and fostering a cohesive network of professionals who can work together confidently and consistently to deliver high-quality outcomes.

Oversight and strategic direction are strengthened through increase to Senior EP time, and a Team Manager for Inclusion Leads, who is responsible for scrutinising data, drawing on local intelligence from partners, and applying a robust RAG-rating system across schools. Health leaders will have a key role in this scrutiny, and the Advanced SALT Practitioner will ensure alignment with health level data, whilst also improving cross boundary working and championing the link across local authorities. This ensures that resources are deployed equitably, areas of need are prioritised, and the reach and impact of the model are continuously monitored and refined.

Importantly, every school benefits from a single, consistent point of contact through their Inclusion Lead, supported by a wider “team around the school” that brings together education, health, and local authority expertise. This model also includes out-of-area mainstream and further education settings within its allocation, ensuring comprehensive system coverage.

By bringing together all partners, the model creates a rich, collaborative network of expertise. This integrated approach not only enhances capacity within schools but also ensures that children and young people receive timely, inclusive, and high-quality support making Experts at Hand a strong, sustainable, and forward-thinking model for inclusive education.

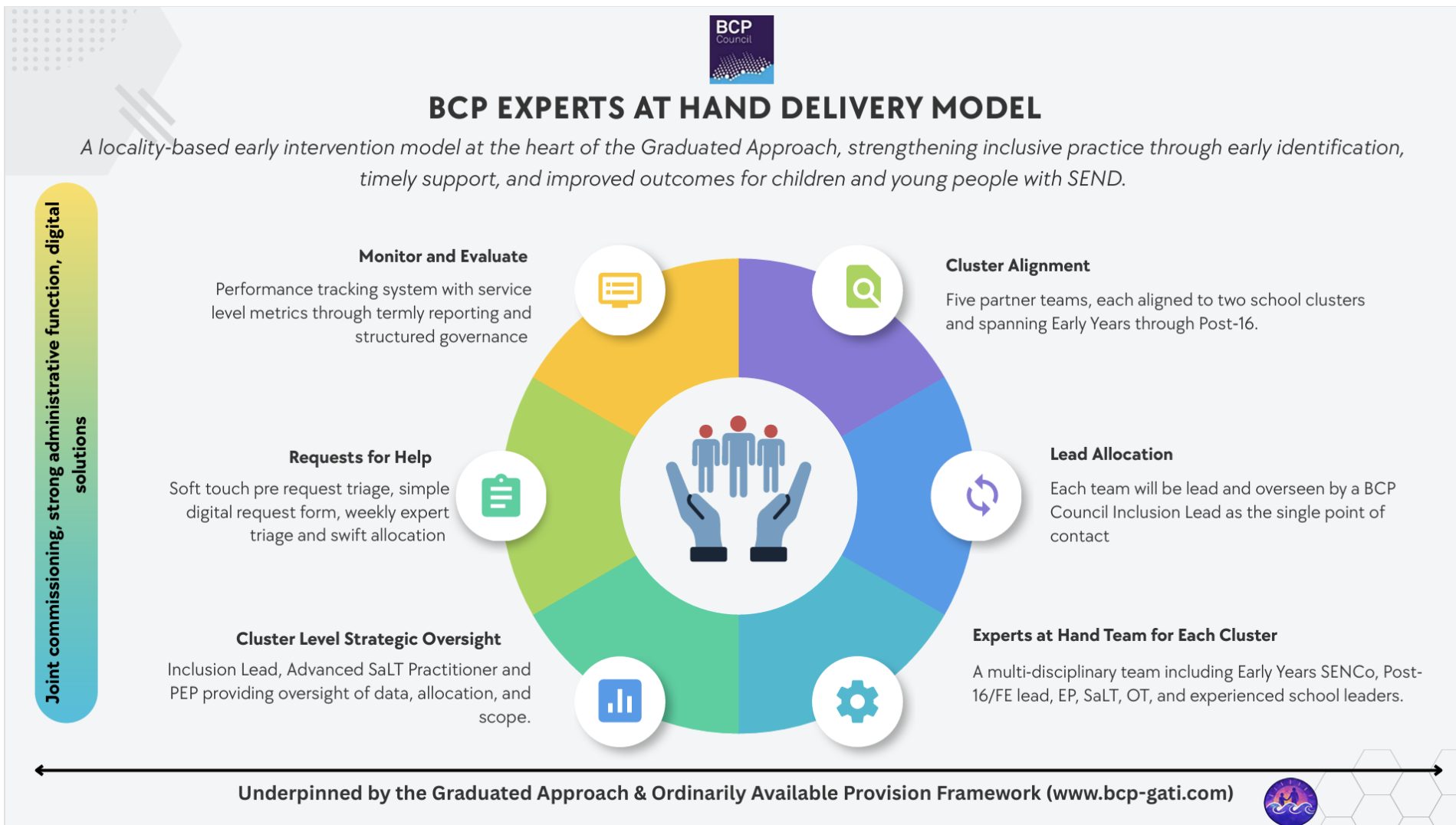
2. Our Support Eco System






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3. Visual Delivery Model


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Area of Need	Universal Offer	Targeted Offer	Expert(s) at Hand
<p>Communication and Interaction</p> 	<p>Guidance, support and coaching:</p> <ul style="list-style-type: none"> Promoting the use of clear, consistent language and instructions across all staff Embedding visual supports such as timetables, symbols or now/next boards into everyday practice Developing structured routines and predictable classroom environments that support understanding and reduce anxiety Supporting teachers to create rich opportunities for talk, interaction and language development within lessons <i>Audit of the sensory environment</i> across classrooms and communal spaces (e.g. lighting, acoustics, visual clutter), with practical recommendations to create more inclusive, low-arousal learning environments. 	<ul style="list-style-type: none"> Guidance on delivering small group language and social communication interventions Support to implement adapted teaching approaches, including chunking, repetition and modelling Advice and modelling of effective adult support to scaffold pupil interactions Development of individual communication strategies, such as visual supports, structured scripts and personalised approaches group-based sensory regulation programmes (e.g. movement breaks, sensory circuits), alongside training for staff on how to embed strategies into daily routines. 	<p>BCP Council Inclusion Leads</p> <p>SEND Lead Practitioners (school leaders) – Universal</p> <p>Special School and Alternative Provision Outreach Team</p> <p>Early Years Area SENCos</p> <p>Speech and Language Therapists</p> <p>Educational Psychology</p> <p>Schools Occupational Therapy Sensory Outreach Service BCP GATI</p> <p>NHS Occupational Therapy Team</p> <p>The Balanced System</p>
<p>Cognition and Learning</p>	<ul style="list-style-type: none"> Promoting quality first teaching with effective scaffolding, enabling all pupils to access learning 	<ul style="list-style-type: none"> Guidance on delivering small group and 1:1 intervention focused on developing specific skills 	<p>BCP Council Inclusion Leads</p> <p>SEND Lead Practitioners (school leaders) – Universal</p>

	<ul style="list-style-type: none"> • Supporting the use of clear instructions, modelling and worked examples to build understanding and independence • Embedding opportunities for overlearning and repetition to consolidate key skills and knowledge • Developing adaptive teaching approaches to meet the diverse needs of learners within the classroom 	<ul style="list-style-type: none"> • Support with pre-teaching and overlearning of key concepts to build confidence and understanding • Advice on additional scaffolding and adapted resources to enable pupils to access the curriculum more effectively • Development of individual targets and focused support plans to guide teaching and monitor progress 	<p>Educational Psychology</p> <p>Special School and Alternative Provision Outreach Team</p>
<p>Social, Emotional, Mental Health (SEMH)</p> 	<ul style="list-style-type: none"> • Promoting positive, relational approaches to behaviour, rooted in strong adult–pupil relationships • Supporting the development of clear expectations and consistent responses across all staff • Embedding emotional literacy within the curriculum to help pupils understand and express their feelings • Creating safe, calm environments and predictable routines that promote a sense of security and readiness to learn • <i>Audit of the sensory environment</i> across classrooms and communal spaces 	<ul style="list-style-type: none"> • Guidance on delivering small group interventions, including social skills and emotional regulation programmes • Support to implement check-in/check-out systems and key adult approaches to strengthen relationships and daily support • Development of individual behaviour and regulation plans tailored to pupil needs • Advice on flexible, responsive approaches to support engagement and participation in learning 	<p>Early Years Inclusion Leads Special School and Alternative Provision Outreach offer</p> <p>Mental Health Support Team</p> <p>Educational Psychology</p> <p>CAMHS</p> <p>Virtual School</p> <p>Family Hubs</p> <p>Attendance and Inclusion Service</p>
<p>Sensory and Physical</p>	<ul style="list-style-type: none"> • Guidance on developing calm, well-organised environments, including the effective management of noise, 	<ul style="list-style-type: none"> • Development of individual sensory strategies and 	<p>Specialist Teachers</p>

	<p>lighting and space to support sensory regulation and accessibility</p> <ul style="list-style-type: none"> • Support to embed regular movement opportunities and brain breaks throughout the day to promote regulation, attention and wellbeing • Advice on flexible classroom approaches, including seating, positioning and layout, to ensure all pupils can access learning comfortably and effectively including the use of assistive technology • Building whole-staff awareness of sensory regulation, including understanding and responding to the needs of pupils with sensory impairments <p>We place a strong emphasis on inclusive practice for pupils who are deaf or visually impaired, supporting schools to:</p> <ul style="list-style-type: none"> • Optimise acoustic environments and communication approaches for deaf learners • Ensure clear visual access, appropriate positioning and use of resources for blind or visually impaired pupils • Promote inclusive classroom routines and staff awareness so that sensory differences are anticipated and supported as part of everyday practice 	<p>personalised support plans tailored to each pupil's needs</p> <ul style="list-style-type: none"> • Advice on and access to specific resources (e.g. fiddle tools, seating supports, sensory equipment) and including assistive technology, to aid regulation and engagement • Guidance on implementing timetabled movement or sensory breaks as part of structured daily routines • Support to make targeted adaptations to the environment to reduce barriers and optimise access for individual pupils 	<p>Special School and Alternative Provision Outreach Team</p> <p>Physiotherapy Service</p> <p>School Nursing</p> <p>Portage</p> <p>NHS Occupational Therapy</p> <p>Health Visiting</p> <p>SEND Sufficiency Team (Accessibility)</p> <p>Schools Occupational Therapy Sensory Outreach Service BCP GATI</p>
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<p>Collaboration and communication with families & young people</p> 	<ul style="list-style-type: none"> • Expert Advice and Guidance – Practical, timely support to strengthen inclusive practice. • Family Partnership Support – Help to communicate and co-produce effectively with families. • PINS partner programme – Support aligned with the Partnership for Inclusion of Neurodiversity in Schools. • Lived Experience Training – Sessions co-delivered by parent/carers to build understanding and empathy. • Capacity Building – Developing staff confidence and sustainable inclusive practice. • Quick Wins for Teachers – Practical, low-effort inclusive strategies. 	<ul style="list-style-type: none"> • Advice and guidance to support improved communication and collaboration • Mediation training support for schools and settings at the targeted level • Autism Awareness (Reality Bus) – Experiential understanding of autism. • Environmental & Sensory Support – Audits and wellbeing strategies. • School Collaboration Networks – Shared learning and joint problem-solving. • Parent–School Partnership Support – Strengthening co-production with families. • Tailored Support Offer – Flexible packages to meet school needs. 	<p>Parent / carer guidance</p> <p>Family resource packs</p> <p>Participation team</p> <p>Children and young people</p> <p>Family Support Team and Early Help</p> <p>Family Hubs</p> <p>Youth service</p>
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5. Aligning with the Targeted Funding Cluster Model

Experts at Hand (EAH) delivers rapid, specialist support to strengthen practice, while the new Cluster Funding approach provides flexible resources to meet identified needs; together, they form a cohesive, needs-led system where expert insight informs funding decisions and supports sustainable, long-term capacity building.

Element of Alignment	How
Integrated Cluster Model	Align both models to the same cluster structure. Inclusion Leads act as the bridge between: <ul style="list-style-type: none"> • EAH support (practice) • Cluster funding decisions
Graduated Approach Pathway	<p>Universal Support</p> <ul style="list-style-type: none"> • Access to one point of contact and cluster level support • Soft triage and requests for help • Main offer: Inclusion leads and School/Setting practitioners • Coaching, modelling, problem-solving <p>Targeted Support linked to cluster funding</p> <ul style="list-style-type: none"> • Funding for: <ul style="list-style-type: none"> ○ Individual pupils ○ Groups ○ Whole school / cluster wide projects
Single 'Request for Help' pathway	<ul style="list-style-type: none"> • One digital platform on the Graduated Approach and triage process for EAH • Cluster level monitoring and evaluation to assess impact of EAH, identify key themes and areas for improvement

	<ul style="list-style-type: none"> • Link EAH cluster level work with the targeted funding • Cluster level decisions to enhance and support EAH work
Cluster Meetings as the Integration	<p>Cluster meetings become the point where:</p> <ul style="list-style-type: none"> • Cases are discussed (solution-focused) • EAH insights are shared • Best practice is transferred
Funding linked to strong inclusive practice	<p>Funding requests must demonstrate:</p> <ul style="list-style-type: none"> • Engagement with Graduated Approach / Ordinarily Available Provision • Evidence of EAH involvement where needed

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6. Requests for Help

Access to Experts at Hand should be driven by identified need rather than a traditional referral process, ensuring that support is timely, responsive and proportionate. By removing unnecessary thresholds and bureaucracy, practitioners can engage with expertise as soon as challenges emerge, enabling earlier intervention and preventing escalation. This needs-led approach promotes professional agency, supports a culture of collaboration, and ensures children and young people receive the right support at the right time without delay.

This is underpinned by cluster team approach with practitioners who know their schools and settings in depth. Through strong relationships and a human, relational approach, support is proactive as well as responsive — with expertise offered, based on data and contextual analysis, not just requested — building confidence and trust over time.

A simple online digital solution provides a structured pathway for settings and schools to access support. Each setting has a designated point of contact who works with services to discuss concerns, support light-touch triage, and agree appropriate next steps. Our offer and model will be published as a structured support menu on our local offer and BCP Graduated Approach platform.

Where additional support is required, a “Request for Help” can be submitted either alongside the point of contact or independently. The form captures key information, including:

- Details of the universal and whole school offer already in place
- Evidence of ongoing concerns and areas of need
- The type of support being requested

A clear closing the loop approach underpins our model, ensuring that support begins with a shared understanding of need, followed by purposeful, tailored intervention, and a robust evaluation process. Impact is captured through both qualitative feedback (from practitioners, children, young people and families) and quantitative measures, enabling services and settings to evidence progress, refine practice, and inform future support. This cyclical process of assess, deliver, review and record strengthens accountability, builds learning over time, and ensures that support remains responsive and effective. This approach to evaluation will feed through to the termly cluster reporting to consistently recognise and support the wider themes.

Keeping the request form simple and effective

- Mostly tick boxes + very short answers
- Drop-down menus instead of long writing
- Auto-fill from previous submissions where possible
- “Guidance tips” next to each section (e.g. examples of good responses)
- Smart prompts based on earlier answers (e.g. attendance triggers EBSNA support options)

Impact of quick fill form

- Speeds up completion (5–10 minutes max)

- Improves consistency and quality of information
- Supports light-touch triage at submission point
- Reduces unnecessary escalation by prompting reflection
- Allows central triage to quickly match need to the identified support level

All submissions are directed to a triage service, where they are reviewed weekly to enable rapid allocation of support. This ensures the most appropriate level and type of support is identified, providing a coordinated and timely response.

The Request for Help process is designed to be supportive and not a burden for settings and schools. It is intentionally framed as a request rather than a referral, promoting collaboration and early help. The process aims to act as a practical, user-friendly tool that helps settings clearly communicate needs and access the right support at the right time.

Avoiding Bottleneck of requests

To prevent bottlenecks, we will move from fully centralised decision-making to a more distributed model, supported by clear guidance and strong escalation pathways by taking the following steps:

1	Introduce Light-Touch Triage At the point of contact, implement a quick 15-minute triage: What is happening, what can be done immediately, what level of support is needed?
2	Strengthen Points of Contact Equip Inclusion Leads and EY Area SENCOs with: Clear role expectations and authority to act at an early stage
3	Standardise Decision-Making Provide a clear decision-making framework and guidance on when to escalate vs manage internally
4	Enable 'Consult Before Submit' Offer quick-access informal advice routes (Teams, hotline, drop-ins) to resolve issues early and reduce formal requests.

5	Build Peer Support Networks Set up regular case discussions and learning sessions to: Improve consistency, increase confidence and reduce inappropriate referrals
6	Improve Quality of Requests Introduce smart request forms, examples of strong submissions and pre-filled insights from triage
7	Use Data to Predict Pressure Points Track and review volume and trends in requests, geographic and locality patterns and types of need and seasonal spikes
8	Implement a Tiered Response Model Ensure support is proportionate: Universal: signposting and guidance, Targeted: focused support, Specialist: expert intervention

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7. Allocation based on data and contextual information

Our data tracking approach is designed to ensure that the deployment of expertise is strategic, equitable, and impact driven. By bringing together multiple data sources, we aim to shift deployment from a reactive model to a preventative one, enabling earlier intervention where need is emerging.

This ensures that resources are allocated fairly, rather than being driven solely by levels of demand or those most able to request support. Through careful analysis, expertise can be targeted to where it will deliver the greatest system-wide benefit, while also building local capacity within settings. Over time, this strengthens inclusive practice and reduces reliance on specialist intervention, creating a more sustainable and resilient system.

We will strategically triangulate using the data sources detailed in the table below to answer three key questions:

1. Where is our help needed the most?
2. Where is the system under pressure?
3. Where will EAH have the greatest impact?

Data Type	What will we track	How it will be used
Demand Data	<ul style="list-style-type: none"> • Volume of EAH requests • Time from request for help to receiving support (timeliness) 	<p>Demand data will identify where schools and services are actively seeking support and where bottlenecks are emerging. High volumes of requests or delays in response times will signal pressure points in the system. This allows for short-term reallocation of experts to manage immediate demand and prevent escalation of need.</p>
Pupil level need data	<ul style="list-style-type: none"> • Levels of EHC needs assessment requests 	<p>This data provides insight into underlying and emerging need at pupil level. Rising EHCNA requests may indicate unmet need earlier in the system. Experts can be deployed upstream into these settings to strengthen early intervention, reduce escalation, and build school capacity before statutory processes are required.</p>
Education Data	<p>Indicators of lost learning:</p> <ul style="list-style-type: none"> • Attendance and persistent absence (including EBSNA) • Exclusion • Levels of off-site direction • Movement to EHE • Requests for alternative provision • Use of part time timetables 	<p>Education indicators reflect how well needs are being met in practice.</p> <p>Patterns of absence, EBSNA, and exclusions highlight cohorts or settings where inclusion may not yet be effective. Experts can be targeted to these schools or groups to support inclusive practice, reduce exclusions, and improve engagement.</p>
Health data	<ul style="list-style-type: none"> • Speech & Language and Occupational Therapy caseloads • Balanced System Scorecard 	<p>Health caseload data highlights demand on specialist services and potential waiting pressures. Where caseloads are high, EAH experts can complement or</p>

	<ul style="list-style-type: none"> • CAMHS • Mental Health Support Teams 	<p>extend provision through indirect support (e.g. staff training, environmental adaptations), helping to maximise impact without duplicating specialist roles.</p>
Capacity Data	<ul style="list-style-type: none"> • RAG ratings from inclusion audits 	<p>Capacity data provides a view of how well settings are equipped to meet needs independently.</p> <ul style="list-style-type: none"> • Red settings: prioritised for intensive, sustained expert involvement • Amber settings: targeted support to prevent decline • Green settings: lighter-touch or system leadership roles (e.g. peer support, modelling practice) <p>This ensures resources are distributed proportionately and builds long-term system resilience.</p>
Contextual and equity data	<ul style="list-style-type: none"> • Levels of deprivation and contextual vulnerability 	<p>This ensures allocation is equitable rather than purely reactive. Areas of higher deprivation may experience greater complexity of need and reduced capacity to respond. Experts will be proactively deployed to these areas to reduce inequalities and prevent widening gaps in outcomes.</p>
Outcomes Data	<ul style="list-style-type: none"> • Increased pupil engagement • Reduction in parental requests for EHCNAs • Improved attendance 	<p>Outcomes data closes the loop by evaluating whether deployment decisions are having the intended impact. It will inform ongoing refinement of the model, identifying which types of intervention, in which contexts, lead to the</p>

	<ul style="list-style-type: none"> • Reduced school moves / placement instability 	<p>best outcomes, so that future allocation becomes increasingly precise and evidence based.</p>
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8. Governance and monitoring

The Experts at Hand governance structure is designed to provide a clear, multi-layered framework that ensures accountability, strategic oversight, and continuous improvement across the system. Rooted in a strong foundation of Ordinarily Available Provision (OAP), the model is monitored at cluster level through regular data-informed review and evaluation, led by Inclusion Leads and supported by practitioners and secondees. Insights from this work are captured through termly and highlight reporting, which provide a coherent picture of impact, emerging trends, and areas for development.

Governance at school cluster level is essential within the Experts at Hand model because it provides clear strategic direction, accountability, and coherence across multiple settings working together to support inclusive practice. By establishing shared expectations, decision-making processes, and quality assurance mechanisms, governance ensures that expertise is effectively mobilised and consistently applied across the cluster, rather than remaining isolated within individual settings/schools. Strong governance also enables efficient use of resources, coordinated professional development, and informed evaluation of impact, which are all critical to improving outcomes for children and young people with SEND.

Strong cluster reports will be scrutinised by the Inclusion Steering Group, before feeding into the SEND and AP System Leadership Board for strategic oversight with a link to joint commissioning to inform partnership-wide decision-making. Under the leadership of the Senior Responsible Officer, this end-to-end governance approach ensures that the Experts at Hand model remains equitable, responsive, and aligned with wider system priorities, with the voices of children, young people, and families embedded throughout.

Outcome measures within the *Experts at Hand* model will align with the emerging [A Pupil Engagement Framework that recognises all young people - Academy21](#), supporting a consistent and inclusive understanding of how all young people experience education. In line with the White Paper expectations, the model will prioritise monitoring key indicators such as pupils' sense of belonging, feelings of safety, quality of relationships with peers and staff, access to inclusive and accessible learning, and levels of motivation and value placed on school. These measures will be explicitly linked to BCP's broader outcomes framework, ensuring that engagement data strengthens the evaluation of inclusion, wellbeing, and participation across the system. Although the national framework is not due for implementation until 2029 and is not yet reflected in current DfE reform guidance, its early

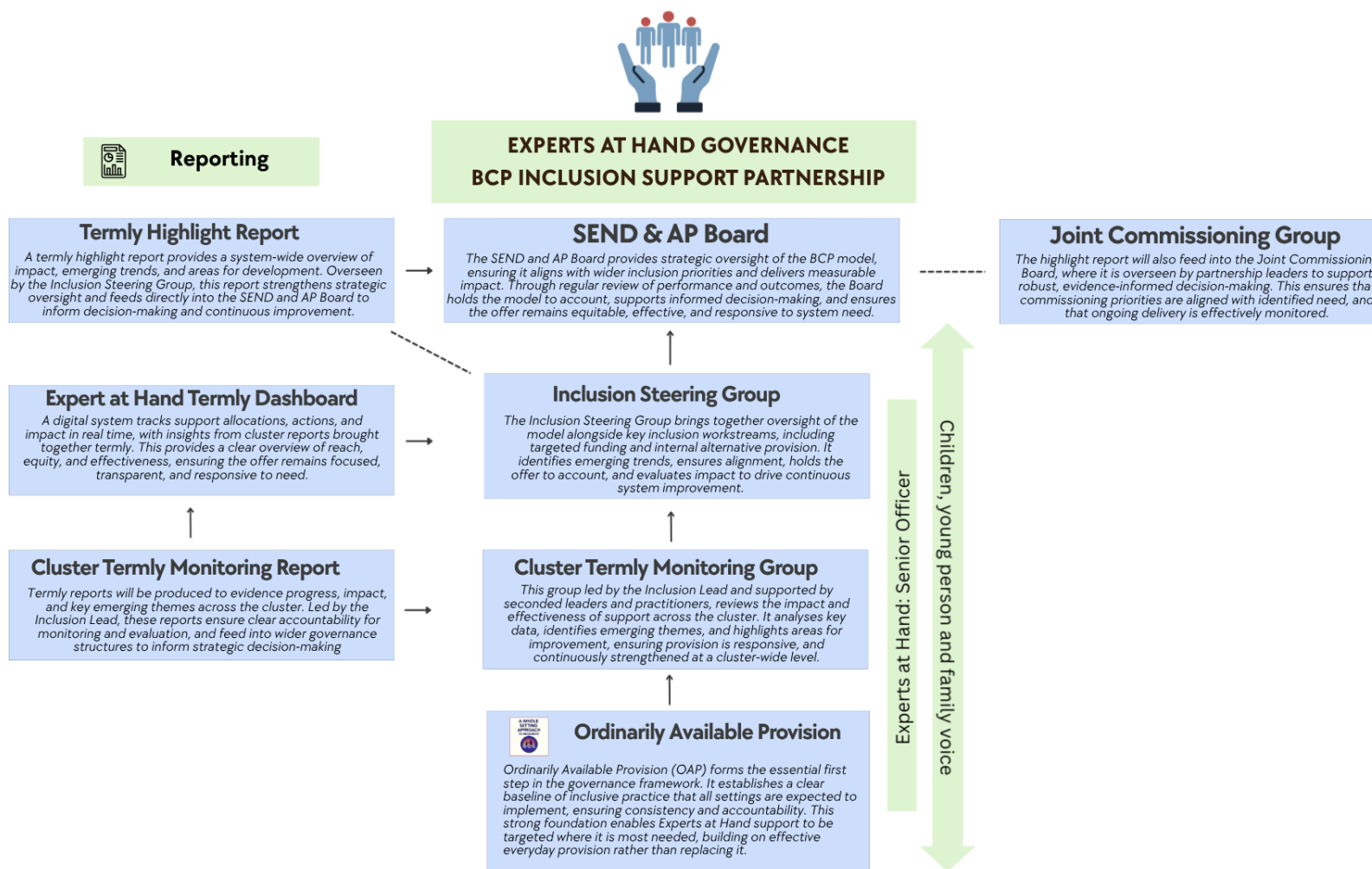
adoption within the model enables proactive alignment with future expectations and supports a more responsive, needs-led approach to delivering improved outcomes.

Partnership wide communication and collaboration

Regular updates will be shared through Headteacher briefings, SENCo forums, and all phase education bulletins to ensure transparency, engagement, and effective communication across the system. Alongside this, we will actively communicate the development and growth of the Experts at Hand model by systematically gathering insight and feedback from practitioners, children and young people (CYP), and families. This ongoing dialogue will enable us to remain responsive and continually refine the offer to meet emerging needs. Monitoring processes will not only track impact but will also be used to celebrate the successes of our schools and settings, showcase innovation, and highlight effective inclusive practice. By sharing these examples widely, we will promote best practice and foster a collaborative, reflective community across the whole of BCP, where learning is shared, expertise is valued, and continuous improvement is embedded.

We will actively engage schools and settings in showcasing the impact of the *Experts at Hand* model through a range of collaborative forums, live practice examples, and the sharing of lived experiences and case studies. This will include opportunities for practitioners to present real-time implementation in action, highlight inclusive strategies, and reflect on outcomes for children and young people. Capturing authentic voices, from staff, pupils, and families, will be central to demonstrating the practical difference the model makes. This approach not only builds shared understanding and confidence across the system but also supports peer-led learning, strengthens professional networks, and promotes consistent, evidence-informed practice. By making the work visible and relatable, we create momentum for wider adoption and ensure that improvement is grounded in what works in real contexts.

Governance and Monitoring Visual



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9. 3-year plan to build EAH Team

Year	Teams / Service to be live
YEAR 1	<ul style="list-style-type: none"> • Inclusion lead Team manager and 5 additional team members • 10 Seconded educational setting leaders (Director of Inclusion, Head Teacher, SENCo) • Expansion of Special School and AP Outreach • Parent Carers Together capacity to implement universal and targeted support offer • Allocation of current Educational Psychology capacity with expansion of Educational Psychologists and Assistant Educational Psychologists • Allocation for SALT per cluster to support at universal and targeted level • Links across existing services to secure reach and equity: BCP Council Schools Occupational Therapy Outreach Service, Early Years Area SENCos, Mental Health in Schools Team and CAMHS • Digital platform to support requests for help, monitoring and evaluation • Governance and monitoring processes • Administrative support • Trial in one cluster to evaluate model and secure final architecture
YEAR 2	<ul style="list-style-type: none"> • Expansion for Educational Psychology • Joint commissioning with ICB
YEAR 3	<ul style="list-style-type: none"> • Full BCP Experts at Hand model in place

10. Strengthened Staffing

We will make investment in expanding our staffing structure to ensure a strong, coordinated and high-quality offer across all clusters. This includes the addition of an Educational Psychologists, Assistant Educational Psychologists, Occupational Therapists, Inclusion Leads, School/Setting Secondments, and enhanced High-Level Administrative capacity.

This breadth of expertise ensures that each cluster is fully supported by a multidisciplinary team, bringing together specialist knowledge, frontline practice and strategic oversight. The inclusion of seconded school and setting staff strengthens the connection to practice, while increased administrative capacity ensures efficient coordination and responsiveness. With clear leadership and oversight now firmly in place, this enhanced staffing model positions us strongly to deliver an integrated, efficient and impactful service—ensuring consistent support, improved collaboration and the capacity for all partners to thrive together

Year 1 Costs

Staff Title	Number of Additional Colleagues (FTE)	Funding per staff member with oncosts	Total Year 1
Staffing (Total Cost: £1,863,425)			
EAH Lead	1	£156,000	£156,000
Principal Educational Psychologist	0.5	£78,000	£78,000
Senior Educational Psychologist	2	£91,321	£182,642
Educational Psychologist	5	£88,575	£442,875
Assistant Educational Psychologist	5	£54,000	£135,000
Occupational Therapist	3	£63,000	£78,750
Occupational Therapist Assistant	1	£35,412	£14,755
Inclusion Lead	5	£72,000	£270,000
Inclusion Lead Team Manager	1	£75,000	£43,750
School/Setting Secondment Specialist Teachers	10 secondments	£58,500 pa	£243,750

Speech and Language Advanced Practitioner Contribution	Contribution across the cluster	£34000	£5220
Speech and Language Therapists	5	£54,020	£135,050
Joint Commissioning Lead	0.7	£59,800	£34,883
Data Analysis Lead	1	£75,000	£42,750
Administration (Total Cost: £113,750)			
Cluster Co Ordinator	5	£39,000	£113,750
Transformation (Total Cost: £357,300)			
SEND Reform Project Manager	1	£156,000	£156,000
Digital Tools and Dashboard	Staff Time	£20,000	£40,000
Finance Analysis Module	Software	£17,000	£17,000
Data Forecasting project work and tools	Staff Time	£55,000	£97,000
Finance Adviser Support	Staff Time	£5,000	£5,000
Communications and Web Design	Staff Time	£20,000	£20,000
Workforce Training and Induction	Staff Time	£20,000	£20,000
Co Production Activity	Staff Time	£2300	£2300
		TOTAL	£2,334,475

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SCHOOLS FORUM



Report subject	SEND Service – Exceptional Funding
Meeting date	22 June 2026
Status	Public Report
Executive summary	<p>This report provides an update on Exceptional Circumstances Funding arrangements for mainstream schools in Bournemouth, Christchurch and Poole for 2026/27. It reviews the 2025/26 funding model, sets out the financial and strategic context, and presents revised model options intended to ensure funding is transparent, sustainable and targeted to schools with the highest proportion of pupils with Education, Health and Care Plans. Schools Forum is asked to note the revised models, select the preferred option for 2026/27, and support ongoing review to ensure the approach remains fair, affordable and aligned with SEND reform priorities.</p>
Recommendations	<p>It is RECOMMENDED that:</p> <p>It is RECOMMENDED that Schools Forum: (a) note the revised Exceptional Circumstances Funding models; (b) select the preferred option for 2026/27; and (c) support ongoing review to ensure sustainability, fairness and alignment with SEND reform priorities.</p>
Reason for recommendations	<p>Additional funding should be targeted to a minority of schools facing particular challenges because of a disproportionate number of pupils with SEND or high needs. A revised model is required to ensure that limited High Needs Budget funding is distributed transparently, fairly and sustainably, and that exceptional funding remains focused on schools experiencing genuinely exceptional levels of EHCP need.</p>

Portfolio Holder(s):	Portfolio Holder for Children and Young People
Corporate Director	Corporate Director, Children's Services
Report Authors	Jeanette Yorke, Head of Service SEND; with contributions from Steve Wade, Management Accountant Finance, Estates and Benefits
Wards	Council-wide
Classification	For recommendation

1. Background Detail

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.

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:

- there is a disproportionate number of pupils with SEND and/or with more complex SEND
- that number cannot be reflected adequately in the funding they receive through the local funding formula.

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. This is outlined in the High Needs Operational Guidance in section 9 of this report.

This report provides an update on the Exceptional Circumstances Funding arrangements for mainstream schools in Bournemouth, Christchurch and Poole (BCP), including:

- A review of exceptional funding model for 2025-26
- Introduction of a revised funding model for 2026–27
- The financial and strategic context underpinning the model

The revised model is intended to ensure that

- Funding is more tightly targeted to schools with the highest proportion of pupils with SEND and the most complex needs
- It ensures funding is transparent, has meaningful impact and is sustainable within a constrained financial budget.

2. Strategic Context

The Local Authority has a statutory duty to ensure sufficient provision for children and young people with SEND.

National policy continues to drive:

- A more inclusive mainstream system
- Increased support delivered in local schools rather than specialist settings
- Funding models that reflect need and complexity rather than historical assumptions

The Exceptional Circumstances Funding model is a key mechanism in supporting this shift locally.

3. Local and National Context

3.1 EHCP's in BCP

- There are currently 3,006 pupils with an EHCP in BCP schools
- Of these 1,978 are in a mainstream school, 3.9% of the BCP mainstream school population, increased from 1.5% (770 pupils) in 2020. (Spring School Census)
- This represents approximately a 160% increase over six years
- There are currently 5,170 children and young people with a BCP maintained EHCP, which equates to a rate of 436.1 per 10,000 0-24 population at the end of April 2026, up from 210.3 in 2020
- This represents approximately a 107.4% increase over six years
- Autistic spectrum disorder, Social, emotional and mental health and Speech, language and communication needs continue to dominate the primary need

Nationally data suggests the average proportion of pupils with EHCP's in mainstream schools is 3.8%, and the South West is 4.0%.

4. Previous Funding Model 2025-2026

The previous model:

- Used a 4% and 6% EHCP threshold
- Operated with a £600,000 annual funding pot

When the exceptional funding model was considered for 25-26, the 4% threshold broadly reflected the local mainstream average of around 3.9% EHCP prevalence. Therefore, it can be considered that the allocation of the funding was not reflective of an exceptional basis.

EHCP prevalence has increased, meaning that 4–5% is now increasingly typical rather than exceptional. To ensure limited funding is targeted effectively, thresholds must be updated to reflect current demand rather than historic averages.

The 2025-26 model allocated funding to 40% and 45% of schools in BCP for each term. The lowest threshold was in line with than the average number of EHCPs per Number on Roll across BCP. The amount paid per EHCP at the 4% criteria was between £90 and £148 and between £138 and £235 at the 6% criteria.

The High Needs Operational Guidance states that 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 or high needs, or their characteristics, or both.

5. Revised Funding Model (2026–27)

5.1 Revised Funding Formula from 2026–27

It is proposed that the baseline for exceptional funding is being raised to 6–7% to ensure that limited funding is targeted at schools experiencing a genuinely disproportionate concentration of EHCP need. Nationally, the average mainstream school has around 3.2% of children with an EHCP and in BCP this is 3.9%. Therefore a 6–7% threshold represents average pressure. With a total funding pot of £600,000, spreading funding across schools with lower levels of need reduces impact and does not meaningfully support those under the greatest strain. A higher threshold allows fewer, larger awards, improves transparency and fairness, and ensures exceptional funding remains exceptional rather than a supplement to core SEND provision.

A proposal for a revised funding formula and eligibility criteria has now been established by the Local Authority that outlines 3 model options. Once the revised model has been determined approved this will take effect from the start of the Summer term 2026-27, with effect from 1st April 2026 based on the summer census.

A number of different models and eligibility criteria were considered and have been proposed 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. The different models are summarised in the following table. Note Model 3 would follow the same criteria as the 2025-26 model where the allocated pot of £600,000 per year remains the same and will be pro-rated using the number of months in a term to calculate the available funding for each term.

Option models	Model 1	Model 2	Model 3
Threshold	7.0%	6.0%	6%
Amount per EHCP	£400.00	£275.00	£120.00*
Threshold			7%
Amount per EHCP			£250.00*
Estimated Number of schools	11	19	19
Estimated Primary Schools	8	14	14
Estimated Secondary Schools	3	5	5

* Indicative amounts that will be subject to change

Model 1 provides additional funding targeted to the minority of schools that have high numbers of EHCPs. This can be accommodated within the existing budget enabling an agreed amount to be set per EHCP.

This calculation will be based on children with EHCPs in BCP council schools.

The allocated pot of £600,000 per year remains the same due to a 0% increase in the HNB this year. It will be pro-rated using the 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.

The schools eligible will be calculated each term using the School Census data for that term.

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.

For the Summer Term 2026 this will be calculated once the Census data becomes available which is expected to be towards the end of July 2026. Eligible schools will be informed once this has been calculated.

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.

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.

5.2 Key Features in Summary

- Fixed £600,000 annual envelope
- Allocated termly using census data
- No application process required

5.3 Strategic Benefits

- Fair and transparent
- Responsive to changing demand
- Targets schools under greatest pressure
- Minimises administrative burden

6. Financial Modelling and Pressure Trends

6.1 Cost Pressure per EHCP

Each EHCP introduces additional cost pressures through:

- Top-up funding above £6,000 thresholds
- Additional staffing and specialist provision
- With EHCP prevalence increasing by over 160% since 2020, this creates:
- Significant escalation in High Needs expenditure
- Increased demand for top-up and specialist support funding

7. Summary Financial Implications

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

8. Summary of Sustainability Impact

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

9. Background Papers

High Needs Funding: 2026 to 2027 operational guidance [high-needs-funding-2026-to-2027-operational-guide](#)

10. Summary of Legal Implications

10.1 Legal Implications

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

11. Summary of Human Resources Implications

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

12. Summary of Public Health Implications

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.

13. Summary of Equality Implications

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

14. Summary of Risk Assessment

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 the SEND Reform being consulted on and implemented.

15. Recommendations

- Note the revised Exceptional Circumstances Funding models and select the preferred option for 2026–27
- Support ongoing review to ensure sustainability, fairness and alignment with SEND reform priorities

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Bournemouth, Christchurch and Poole Schools Forum

Forward Plan

22 June 2026

- Update of Terms of Reference
- DSG Outturn 2025-26
- Local SEND Reform Plan – Verbal update
- Experts at Hand Model
- Exceptional Circumstances funding
- AOB
- Forward Plan

21 September 2026

- Schools Forum membership
- SEND Reform Plan
- Quarter 1 Budget Monitoring
- High Needs Update 2026–27

16 November 2026

- DSG Budget Monitoring
- High Needs Update
- 2027–28 Financial Settlement
- Early Years Single Funding Formula 2027–28
- SEND Reform Plan
- Forward Plan

11 January 2027

- Financial Settlement and draft budget
- Mainstream School Funding
- Early Years Funding Formula
- Maintained School Services / Central Retention
- Forward Plan

8 February 2027 (if required)

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