



**Meeting held on Monday 16 January 2026 at 8.00am
via TEAMs**

MINUTES

Attendees	
Steve Kernan (SK) (Chair), Alex Allenby (AA), Jane Aukett (JA), Sarah Bate (SB), Liz Brummer (LB), Kate Cowdroy (KC), Karen Linton (KL), Richard Gargon (RG), Jo Indian (JI), Emily Powell (EP), Rachel Revell (RR), Tracey Richman (TR), Carianne Robson (CR), Jenni Steel (JS), Corrinne Wilson (CW), Neville Wilkinson (NW)	
1/26	Apologies Apologies for absence had been received from Cllr Cracknell, Wendy Jackson and Nina Siddle.
2/26	Chair's Welcome The Chair welcomed everyone and thanked all those responsible for compiling and circulating the comprehensive paperwork for the meeting.
3/26	Minutes of Previous Meeting held on 26 June 2025/Matters Arising from the Minutes The Minutes of the previous meeting held on 26 June 2025 were agreed as a true record. Matters arising: <u>Finance update</u> NW asked if there was further detail on the increase to £4.7b funding for SEND by 2028/29. Also, how the LA compared with others in terms of high needs and the average cost of SEND places. LB responded that there were some priority papers for the Schools Forum to sign off that day but for the next Schools' Forum, there would be a paper on high needs and the items raised tied in with this. Also, there would be more information on the LA's position as we would be closer to the year end
4/26	Schools Funding 2026-27 LB shared a copy on screen and stated that considerable work had taken place on the schools' funding formula for 2026/27. The Schools Forum Working Party (SFWP) had already met to review the options and proposals and their preferred option was shown. The Authority Pro-Forma Tool (APT) had to be submitted the following week for the locally agreed funding formula to the DfE and the LA had to show how it could balance the budget with the funding allocated. The LA had been allocated £143.8m for the Schools Block element for mainstream schools. Further grants had been rolled into the Schools Block from 2026/27 including School Budget Support Grant and National Insurance Grant and these had been factored into the figures. They had also rolled in AWPU, FSM6 and lump sum factors and for this reason, it was not a similar comparison with last year. The

allocation given by the DfE compared to using NFF values had left the LA with a shortfall of approximately £0.5m. The SFWP had looked at how the values could be amended to bring the budget into a balanced position. This exercise was carried out last year and the SFWP had looked at the most fair and equitable way to do this. They had considered the two options:

- 1st option was to change the FMS6 for both Primary and Secondary and reduce the lump sum which was the option last year.
- 2nd option was to change the AWPU rate.

Attention was drawn to the figures for both options which would balance the budget.

LB stated that in addition, the SFWP also looked at a block transfer from the centrally retained element of the Early Years block of £0.1M and this would be applied under both options proposed.

The SFWP proposed the 2nd Option to reduce the AWPU rate. An analysis of the impact on individual schools had been shared and there were fewer high losses. For this reason, the SFWP considered that it was more equitable and shared across the schools.

CR stated that she was on the SFWP and had shared the two options with the Secondary HTs who had all voted for option 2.

SK stated that by adjusting the AWPU, it would protect the more deprived schools and there was greater equity. LB advised that the SFWP had looked at the cash reductions and no school had a significant loss, although there was not a huge disparity between the two options.

JS confirmed that the SFWP had worked hard to determine a decision and had taken into account the moral impact under option 1 on the FSM children. It had not been an easy decision and colleagues had discussed the matter at great length.

New Primary Schools

LB stated that two new free Primary Schools had opened in September and due to the fact that the Dedicated Schools Grant Schools Block allocation was based on the October head count, they were classed as growing schools and for this reason, the headcount would increase in September 2026. There had to be an adjustment for them on the APT. The estimated additional cost for these changes would be £0.2M and the SFWP proposed an over allocation of the Schools Block. If this was not accepted, there would have to be additional reductions of the AWPU rates. It would also reduce the direct impact on the existing settings.

Growth Fund

LB stated that it had been agreed to establish a small in-year growth fund of 0.02% of the Schools Block equal to £0.03M. The existing growth fund policy for 2026/27 remained unchanged and was in line with DFE guidance. This provided the ability to deal with any growth fund requests. SK sought clarification on the growth fund in the previous year. LB responded that it was relatively small and compared with the previous year.

	<p>Schools' Forum were asked to note the following figures:</p> <ul style="list-style-type: none"> • The maximum Minimum Funding Guarantee (MFG) was set at 0.0%. The total cost of providing the MFG was £0.1M • Put 71.04% of the funding through Basic pupil factors – Age Weighted Pupil Factors (AWPU). This was 71.5% in 2025/26 • Put 93.3% of the funding through Pupil led factors – Age Weighted Pupil Factors (AWPU), deprivation, prior attainment etc. This was 93.1% in 2025/26. • Includes block transfer from Early Years of £0.1M • Establish an in-year 2026/27 growth fund of £0.1M • Allocates the Schools Block as below: <table> <thead> <tr> <th></th><th style="text-align: right;">£M</th></tr> </thead> <tbody> <tr> <td>2026/27 Final Allocation</td><td style="text-align: right;">144.6</td></tr> <tr> <td>Less NNDR</td><td style="text-align: right;">(0.7)</td></tr> <tr> <td></td><td style="text-align: right;">143.9</td></tr> <tr> <td> Add Transfer from EY Block</td><td style="text-align: right;">0.1</td></tr> <tr> <td> Total Funding</td><td style="text-align: right;">144.0</td></tr> <tr> <td> Proposed School ISBs</td><td style="text-align: right;">144.1</td></tr> <tr> <td> In-year Growth Fund</td><td style="text-align: right;">0.1</td></tr> <tr> <td> Total Allocations</td><td style="text-align: right;">144.2</td></tr> <tr> <td> Over Allocations</td><td style="text-align: right;">0.2</td></tr> </tbody> </table> <p>LB stated that the over allocation related to the two new Primary Schools in line with accepted practice</p> <p>Resolved: That School Forum members voted in favour of the Option 2 proposal for adjusted AWPU.</p>		£M	2026/27 Final Allocation	144.6	Less NNDR	(0.7)		143.9	Add Transfer from EY Block	0.1	Total Funding	144.0	Proposed School ISBs	144.1	In-year Growth Fund	0.1	Total Allocations	144.2	Over Allocations	0.2
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5/26	<p>Growth Fund Policy</p> <p>LB stated that a paper had been circulated and it was a refresh of the existing Growth Fund Policy based on the same criteria this year. It set out the policy for the year and nothing had changed. Any requests received must meet the criteria. SK asked if LB liaised and worked with other authorities around the policy and if it was standardised. LB confirmed that there was guidance from the DfE on how the Growth Fund should operate and NEL operated within this. It was the same standard across other authorities.</p> <p>Resolved: That Schools' Forum noted the Growth Fund Policy.</p>																				
6/26	<p>Centrally Retained and De-delegated expenditure 2026/27</p> <p>LB shared her screen. She stated that this was the annual review of the centrally retained and de-delegated expenditure and there was a recommendation to agree a proposal in the report and to note the details.</p> <ul style="list-style-type: none"> • Agree the proposals within the report regarding centrally retained expenditure. • Note the decision of no de-delegation of funding in 2026-27 by the Schools Forum maintained schools representative (this decision was decided by the Maintained Schools) <p>Under the schools guidance, there were certain elements retained by the Council from the funding through a top slice of the DSG. There was no change from previous years and was in line with the DfE allowable guidance.</p> <p>The following items were for consideration by Schools Forum:</p> <table> <tbody> <tr> <td>Admissions</td> <td style="text-align: right;">£217,559 (this has been the same figure for</td> </tr> </tbody> </table>	Admissions	£217,559 (this has been the same figure for																		
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	<p>Servicing of Schools Forum some years) ESG Retained Rate £6,300 £256,122 (subject to a small inflationary figure in line with the Schools Block)</p> <p>Termination of Employment Costs £434,000 (there had been an expectation that this cost would reduce year on year but this was not the case)</p> <p>Each line was subject to a separate vote. There were no questions raised.</p> <p>Resolved: That Schools' Forum approved the expenditure for Admissions of £217,559.</p> <p>Resolved: That Schools' Forum approved the expenditure for Servicing of Schools Forum of £6,300.</p> <p>Resolved: That Schools' Forum approved the expenditure for Termination of Employment Costs of £434,000.</p> <p>Resolved: That Schools' Forum approved the ESG Retained Rate of £256,122.</p> <p>LB advised that it was necessary for Schools Forum to approve the Early Years centrally retained funding to service the Early Years activities. Based on current funding, this was £673,928. The maximum amount of Early Years Support Grant that could be centrally retained had been reduced by DFE from 4% to 3% for 2026-27. NELC had taken the decision to retain 2.75% and from within this, a proposed block transfer of £0.1M, as referred to previously. SK asked if the centrally retained figure was sufficient. LB responded that she had discussed this with JS and, although it had reduced, it was sufficient to find the support needed within the figure.</p> <p>Resolved: That Schools' Forum approved the Early Years Centrally Retained Funding of £673,928.</p> <p>Resolved: That Schools' Forum noted the information regarding the purchase of Licences by Government at an approximate cost of £140,000.</p>
7/26	<p>Early Years rates 25/26 and general update</p> <p>CW advised that in December, NELC received notification of the DSG EY allocation. This had been determined differently this year. Historically, this was set by the annual spring term census but as the EY funding had increased and expanded into the under 3's rates, the allocation was determined partly this year by the annual census and partly by a termly submission. The operational guidance had been published in December and covered all aspects of the EY entitlement and included:</p> <ul style="list-style-type: none"> • the 3- & 4-year-old universal (15 hours) and extended (15 hours) offers; • the 2-year-old disadvantaged (15 hours) and • the 9 months to 3-year-old working parents (30 hours) • Early Years Pupil Premium (EYPP) • Disability Access funding (DAF)

	<p>In addition, there was also maintained nursery school (MNS) supplementary funding for 3 & 4 year olds. The LA rate for NEL was still at the low end of Government funding and was as a result of a cost adjustment for a low income and rateable area. The projected funding for 2026-27 was £25M and was a significant increase compared to previous years. There were a small number of changes to the operational guidance, the significant one being a drop in the pass-through rate. NEL could retain up to 4% last year but for the next financial year, could retain a maximum of 3%. However, NEL had gone below this to pass on as much as possible to providers. Although not yet statutory, NELC must publish their hourly rates by 28 February 2026. In line with the guidance, NELC would be moving to termly census submissions in April 2026 which could potentially impact on the funding term by term. Locally, there was an increase in the take-up for the working families entitlement so this could increase the annual allocation for the next financial year. Within the guidance, there was also some information on the change in eligibility for the SEND inclusion fund.</p> <p>A consultation had taken place with all the EY providers which had commenced in the previous week for them to decide on their preferred option for the deprivation rate. Three information sessions had taken place to explain the process to providers and the consultation would close on 1 February 2026. The submissions would then be reviewed and a report produced which would determine the hourly rate for the providers.</p> <p>In terms of sufficiency, there were sufficient places across the Borough for all age ranges. However, not all of these were in the right place or age range. Currently, there were 1.6 places available for each eligible child in NEL and potentially, there could a need for 120 part time places in certain Wards. Work would take place with the existing providers to review capacity and determine if this could be increased as there was not enough projected demand to sustain a new setting. A market place event had been planned for 30 January 2026 for providers to meet the team and review the details. This would also include before school, after school and holiday care. Information had been sent to all schools, settings and stakeholders for the drop-in event. NELC would continue to assess the supply and demand on a termly basis and monitor projections as much as possible.</p> <p>SK thanked CW for her work and report. He requested that CW shared information on the agreed hourly rate for providers in advance of the next meeting. CW responded that the proposal was contained within the consultation document which had been issued, but much depended on the option chosen by providers in terms of deprivation which could add an extra 1p on the hourly rate. As soon as the consultation closed and the report written, she would circulate to Schools Forum. SK also requested feedback on the market place event.</p> <p>Action: CW...</p>
8/26	<p>Any other business</p> <p>There was no other business raised.</p>
9/26	<p>Date of next meeting</p> <p>The date of the next meeting was 18 March 2026 and JS was requested to re-send the calendar of meeting dates.</p> <p>Action: JS</p>