

**SCHOOLS FORUM MEETING**  
**HELD ON 6 OCTOBER 2025**

**PRESENT:**

Primary Headteacher Representative: Mrs K Coe

Primary Academy Headteacher Representative: Mrs S Richardson (Chair)

Secondary School Headteacher Representative: Mr R Henderson

Secondary School Headteacher Academy Representative: Mrs L Spellman

Special School Representative: Mr M Little

Trade Union Representative: Mr L Russell

Primary School Governor Representative: Mrs S Symington

**OFFICIALS:** Mr A Bryson – Chief Accountant  
Mr G Waller – Senior Accountant  
Mr M Ellwood – Senior Finance Technician  
Mr E Huntington – Assistant Director Education, Inclusion and Achievement  
Mrs V Housley – Head of Service Education and Inclusion  
Mrs S Hewitson - Secretary to the Forum  
Mrs E Dyball – Strategic Lead SEND Practice

**OBSERVOR:** Mr D Leane – Additional Posting  
Mr G Lightfoot – Gazette Newspaper

*The agenda was reorganised in the following order.*

1. **APPOINTMENT OF CHAIR**

One self-nomination was received to be considered as Chair, Mrs Richardson.

*Following an open vote, it was:*

RESOLVED that members unanimously agreed to appoint Mrs Richardson as Chair of Schools Forum.

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2. **STOCKTON SCHOOLS FORUM CONSTITUTION & RULES OF CONDUCT**

A copy of the Stockton Schools Forum Constitution & Rules of Conduct 2025-26, current membership and vacancies and the covering report were distributed in advance of the meeting. The Forum had continued to experience challenges in achieving quorum at meetings, particularly in the period following the COVID-19 pandemic. Attendance had declined, with virtual meetings appearing to contribute to reduced engagement. Attendance data reviewed had covered only the previous year.

Mr Bryson had confirmed that there were no changes to the Constitution or Code of Conduct. However, it was noted that the proportional representation outlined in Section 2 was out of sync, particularly in relation to primary maintained school numbers. At the time, there were six academy representatives, with recommendations to increase this number. Two vacancies remained for primary representatives.

Section 3 of the Constitution outlined the terms of office, currently set at two years. Discussion had taken place around the final paragraph, which referred to attendance at three consecutive meetings. Apologies had been noted and others, with a high number of

	<p>accepted apologies impacting the Forum's ability to make decisions.</p> <p>Members had discussed the possibility of introducing named substitutes to improve attendance and ensure they were quorate. It was proposed that each Schools Forum member identify a deputy who could attend in their absence, with one of the two named individuals required to be present. This approach aimed to maintain continuity and decision making capacity.</p> <p>Attendance was being actively monitored, and non-attending members had been contacted. A suggestion had been made to highlight the decision making process more clearly, possibly through a Chairs briefing and further engagement with primary and secondary academy representatives.</p> <p>RESOLVED that:</p> <p>a) Members approve the Schools Forum Constitution and Rules of Conduct 2025-26.</p> <p>b) Appointment of Vice Chair be added to the next agenda.</p>	Action
3.	<p><u>APOLOGIES FOR ABSENCE</u></p> <p>The Governance Professional had agreed to email all members to request the identification of a deputy who could attend meetings in their absence to ensure they were quorate. Members would also been reminded that any apologies for absence should be submitted in a timely manner. Where this was not possible, a justified reason would need to be provided for the apology to be formally accepted.</p> <p>RESOLVED that the apologies for absence were received from Cllr C Clark, Cllr L Evans, Mrs D Law, Mrs E Robertson, Mr E Squire, Mrs M McCarthy, Mr C Wilkinson and Mrs C Humble be accepted by the Forum.</p> <p>These apologies were agreed to be accepted</p>	Gov.Prof
4.	<p><u>DECLARATION OF INTERESTS</u></p> <p>Members were invited to declare any personal or business interests they may have in any item included on the agenda.</p> <p>No interests were declared.</p>	
5.	<p><u>MINUTES OF THE LAST MEETINGS – 21 JANUARY 2025 &amp; 1 JULY 2025</u></p> <p>RESOLVED that the minutes of the meetings held on 21 January 2025 and 1 July 2025 be approved by members.</p>	Clerk
6.	<p><u>MATTERS ARISING</u></p> <p>6.1 <u>De-Delegation</u></p> <p>Mrs Coe confirmed that she was still awaiting information from the last Schools Forum meeting regarding De-Delegation figures from Mr Waller. Mr Waller would forward the relevant information.</p> <p>6.2 <u>Minutes</u></p> <p><b><i>A member questioned when the minutes were circulated to members of Schools Forum.</i></b> The Governance Professional clarified that these were issued to the Chair and Mr Bryson for review then circulated to members with the meeting papers for the next meeting (7 days prior to the meeting). A member suggested</p>	Mr Waller
		Gov.Prof

that the minutes were shared with all members, following review by the Chair.

## 7. HIGH NEEDS UPDATE

A copy of the High Needs Presentation and the Schools Forum Sub Group Proposal documents had been circulated ahead of the meeting for information. Mrs Dyball guided members through each slide of the presentation. The current funding was expected to run out by July 2026, and with the anticipated release of the White Paper, there would be a need to review the service and assess its impact. This was part of a larger piece of work aimed at ensuring the support provided was sustainable going forward.

There had been a noticeable increase in demand, with children remaining on EHCPs for longer and more moving into special provision. Stockton currently had the highest rate of EHCPs in the North East. The service was accessing more children and writing more plans, with 74 children with EHCPs moving into the borough and a further 26 plans created. Finding specialist school placements continued to be a challenge.

SENDMAP was referenced in the presentation and a change to the decision making panel was planned from January 2025. A list of changes was shared. Most placements regionally were in mainstream schools with EHCPs and there was an interest in exploring different models of provision to ensure needs were being met effectively. A deep dive into SEND tribunals is also underway, alongside work on the sufficiency strategy.

There was a recognised gap in SEMH provision, which was being addressed with support from corporate management. Work was underway to expand resources and provision in this area over the coming weeks. Additional resources were being considered and the High Needs Funding Sub Group proposal based on a model used in Darlington was introduced to allow for a deeper exploration of HNF.

Questions were welcomed at this juncture.

***One member raised a question about why Stockton had more EHCPs than any other region in the North East, particularly in maintained schools.*** It was noted that while statistical neighbours were not significantly different, areas further afield showed a much larger gap. There had been a significant increase in needs identified in Years 10 and 11, and a post-COVID rise in 0–5 age group needs, especially around speech and language. The service was working to understand these needs earlier and improve sufficiency in special schools.

Mr Huntington commented that the needs being presented to panels were genuine and that earlier identification was key. ***Mrs Spellman asked about foetal alcohol syndrome, which had been featured on the BBC that morning.*** Mr Huntington responded that the needs identified often aligned with social care demographics.

***A question was raised about the quality of Educational Psychology (EP) support.*** Recruitment efforts have so far been unsuccessful, but the team plans to try again. This would support early intervention efforts. Mrs Dyball noted that the increase in demand has made it difficult to source EPs, and some are not working face-to-face. A member asked about the number of requests for 0–5 and 5–11 age groups. Mrs Dyball confirmed a 31% increase in early years and a 9% increase in other years.

SENDMAP figures were discussed, particularly around how many of the increases in funding related to new cases not previously known to the service. ***A member asked about the 32 specialist placements and whether work had been done to identify gaps in Section F.*** The hope is that through the IEF, all schools would be reviewed to understand what was needed and where funding may be lacking. The aim was to have an action plan in place for each school.

***Another member raised the issue of SEND tribunal outcomes, noting that 99% of***

**appeals were won by parents last year.** The service was trying to resolve issues earlier where possible, and the upcoming White Paper may address this imbalance. There was no consistent pattern in why parents were winning cases. One-to-one support was highlighted as a challenge, with costs around £30,000 making it difficult for schools to meet needs within budget. Mrs Dyball expressed a desire for the sub group to explore these areas further.

There was also discussion around the lack of physical needs being addressed in Section F, particularly in relation to one-to-one support. Understanding where needs were arising in individual schools was important, and it may be easier to manage this through ARPs. It would be useful to look at demographics and whether schools were maintained or academies, as well as the financial impact of one-to-one support and the need for more clarity in Section F.

Mrs Coe, Mr Little, Mr Leane and Mrs Richardson volunteered to join the Sub Group. **A question was raised about ARPs and SEND units, and how the Local Authority was helping to address gaps.** This was part of the wider strategy, with secondary provision already in place and work underway to refresh primary provision. The plan included building in schools with surplus capacity of 20% or more, although a lack of space in primary schools was highlighted. Finance and risk management were confirmed as part of the strategy, with Mr Bryson stated that whatever was needed would be supported.

Mr Huntington commented on the proposed free school for SEMH at KS3 and KS4, noting that there had been no update from the DfE and that no action could be taken until official contact was made. Mr Bryson added that analysing data as part of the sub group would be important and that the organisation was focused on reducing the deficit. There was a need to stem the flow of funding to independent provisions and providers.

## 8. BUDGET MONITORING REPORT

A copy of the Budget Monitoring Report and appendix was circulated in advance of the meeting for information. Mr Bryson and Mr Waller guided members through the document.

The Dedicated Schools Grant (DSG) budget for 2025/26 was set as a balanced budget with most of the additional DfE HN funding for 2025/26 (£3.4m) used to support necessary increases in funding for Agency Placements, other LA school placements, Alternative Provision and Therapies/Other related health services. This therefore meant that at best the current DSG deficit of £6.72m was expected to be unchanged at 31/03/2026.

However, based on a review of projected expenditure on High Needs at quarter 2 (outlined below) it was now expected that this target would not be met. Instead, an in-year overspend of £4.65m was now expected which would increase the cumulative deficit brought forward from 2024/25 of £6.72m up to £11.37m. This revised position would be reflected in the medium term financial plan.

There had seen a significant increase in funding for the Early Years Block relating to the Governments childcare expansion programme. The funding rates had set were based on estimated activity levels and once the data has been analysed for the 2025 summer and autumn terms, a more accurate picture should be provided in quarter 3.

Appendix 1 shows the revised budget against the projected outturn for 2025/26 on the Schools Budget as at 30<sup>th</sup> September, in the prescribed DfE Section 251 reporting format. The reasons for significant variances between planned and projected spend were:

- Line 1.2.1 Top-up funding – maintained schools - £231k overspend on top-ups relating to an increase in the cost / number of pupils placed in other LA maintained schools (incl. 3 new placements since the budget was set).
- Line 1.2.2 Top-up funding – academies, free schools and colleges £1.2m overspend relating to the anticipated additional costs arising from the introduction of new ARP/SEN units and continuing support to the remaining EMS provisions. £580k overspend so far this year on exceptional High Needs funding payments to mainstream and special academies. £612k overspend on top-ups relating to an increase in the costs / number of placements of pupils placed in other LA academies (12 new placements since the budget was set).
- Line 1.2.3 Top-up funding – non-maintained and independent providers - £1.71m overspend. Mainly Independent Special School placement costs, where there were currently 223 placements at an average cost of £62k p.a. The number of placements had increased by 56% so far since March 2023 (143 to 223) with the annual cost anticipated to increase by over 89% (£7.1m to £13.4m).

Also, £100k overspend expected on additional tutoring costs to external providers.

- Line 1.2.7 Other AP provision - £200k overspend on tutoring costs and other support for excluded pupils.

**A member questioned what the £200k overspend was.** It was confirmed this related to provision for pupils who were permanently excluded (PEX) and children who had moved into the area, requiring provision from day 15. **A member asked where there were more suspensions and exclusions.** It was noted that secondary schools had higher rates than primary, but there was a rise in PEX at primary level. Primary schools had sufficient places, whereas secondary schools had limited places.

It was noted that the PRU received a very negative Ofsted report. A discussion followed about who was currently in the PRU. KS4 places were not as fluid, while KS3 had turnaround placements. KS3 children often undergo EHC assessments but do not have plans in place to move them out of the PRU. Special school places were lower. Fair Access was also discussed.

**A member asked about independent providers and what the situation would look like without SEND units.** It was noted that 51 new placements had resulted in a cost avoidance of £3 million per year and this would begin to show improvement over time at St John the Baptist. However, some units were already full, raising concerns about what would happen next year with places. Mrs Dyball confirmed that the policy was being applied more rigorously to ensure children met the criteria and that funding was not allocated where criteria were not met. Mr Bryson confirmed that borrowing money was not an option.

**A member asked about the 430 children new from SENDMAP and the anticipated costs.** Mr Bryson confirmed that costs will go up year on year and that the current spend 13.4 million. The approach has been to spend less to cover the deficit. The Chair commented that continuing with a year-on-year deficit was not sustainable. Mr Waller confirmed that budgeting was based on known numbers and estimated growth.

A member commented on the growth in needs within existing providers and the increasing numbers. He suggested looking at the metrics and what each EHCP was costing schools. It was suggested that HNF be tracked to April 2026 moving forward to better understand the impact.

**A member asked about cost avoidance if the free school SEMH provision was in place.** It was noted that this was uncertain and that the free school would only offer short-term relief and would not address long-term SEMH needs. Tutoring costs would likely

come down. There was a question about proposals regarding independent special school places. It was confirmed that there were backup plans involving less expensive providers, but there was no control over tribunal outcomes. It was suggested that tribunal information, including reasoning, would be useful for the sub group. Also it was suggested that it may be helpful to ask parents why they were choosing placements that involved long taxi journeys.

***A member asked if there was any work being done outside of Stockton and whether good practice was being explored.*** It was confirmed that alternative solutions were being looked at and that the system nationally was broken.

***A member asked whether EHCPs would be stopped in the future.*** It was suggested that that EHCPs would not be removed, but there would be some changes in this area.

RESOLVED that governors note the Budget Monitoring Report and appendix.

## 9. SCHOOLS FUNDING ARRANGEMENTS 2026/27

A copy of the Schools National Funding Formula Update Document, Appendix A and School Funding Consultation document was distributed prior to the meeting for consideration.

On the 4<sup>th</sup> August DfE published details on the key elements of the schools national funding formula (NFF) to support planning by local authorities, schools and academy trusts, ahead of the publication of the NFF allocations for 2026 to 2027. This document is attached (see Appendix A).

DfE plan to publish the NFF allocations and supporting documentation (including operational guidance) in autumn 2025 due to the multi-year spending review concluding in June 2025. DfE expect that the DSG allocations using the NFF will be published in December 2025 as in previous years.

In June 2025, the government announced that, starting from September 2026, free school meals (FSM) will be extended to all children in households receiving Universal Credit. For 2026 to 2027, DfE were not proposing any changes to the schools NFF to allocate funding for this expansion of FSM. Instead, the funding needed for the FSM expansion will be provided through a separate grant. Further details on how this grant would be calculated would be published separately in due course. The key point to note was that the 2026 to 2027 schools NFF will use the same factors as the 2025 to 2026 NFF.

The schools budget support grant (SBSG) and the National Insurance contributions (NICs) grant would be rolled into the NFF for 2026 to 2027. For the NICs grant, the funding rolled in to the NFF will use the published funding rates directly.

For SBSG, however, DfE will take a slightly different approach to rolling in this funding to the NFF. This was because the total funding in the SBSG in 2025 to 2026 was calculated regarding the full-year cost of the support staff pay award, as well as the part-year cost of the 2024 teachers' pay award (from September 2025). Therefore, to roll in this funding, DfE would calculate the full year equivalent of the whole of the SBSG and then calculate new (higher) full-year equivalent funding rates from this new total. The cash values rolled into the NFF in 2026 to 2027 would then reflect these full-year equivalent funding rates.

DfE would be running the disapplication process to similar timelines as last year and confirmed that the deadline for all 2026 to 2027 disapplication requests will be 17 November 2025.

DfE aims to publish NFF allocations for schools and all supporting documents on the NFF (including the schools operational guide and NFF technical note) for 2026 to 2027 in the Autumn. As a result of the above an accurate figure that equates to 0.5% cannot be

calculated but it is estimated to be between £900k to £950k.

Please note that the disapplication request would only be required if the Forum does not approve the 0.5% transfer or due to the increasing DSG deficit the Council decides to request an amount above 0.5%.

All other Forum decisions and consultations would commence once the NFF documentation and notional allocations have been provided. If these notional allocations are announced in a timely manner, then the Schools Budget and NFF report will be brought to the meeting on the 10<sup>th</sup> November.

RESOLVED that:

- a) Consultation to take place via email to ask maintained schools if they support the transfer of 0.5% from the Schools Block to High Needs Block in 2026/27 with a return date of 5<sup>th</sup> November 2025. Governance Professional to circulate to maintained schools and responses to be submitted to Mr Bryson.

Mr Bryson/  
Gov Prof

#### 10. DELEGATION / DE-DELEGATION 2026/27

A copy of the Delegation/De-delegation paper, Facility Time paper and single letter to LA's from NAHT were circulated in advance for information.

#### **RECOMMENDATION:**

That the eligible Schools Forum members representing maintained schools seek the views of their respective maintained school representatives with a view to a vote at the Schools Forum on the 10<sup>th</sup> of November.

Under the government's funding reforms there was an assumption of delegation for a number of budget areas which are currently held centrally for maintained schools and were delegated for academies. Maintained school's primary and secondary representatives on the Schools Forum can vote, by sector, to de-delegate these areas where it was proposed by the local authority. The outcome of the vote was binding for all maintained schools in that sector.

If the Schools Forum voted against the proposals for de-delegation then a range of costs and associated responsibilities currently met centrally by the local authority would transfer to maintained schools for them to manage themselves. The budget for these costs would also transfer to schools on a formula basis which was previously consulted on and agreed.

Academies were not part of these arrangements since these responsibilities and the funding for them are automatically delegated through the ESFA using the local funding formula.

Responsibility for a number of services and associated funding that falls within the regulations had been delegated for several years and it was proposed that this continued for those areas namely, insurances, museum and library services and staff supply costs (other than trade union duties).

The Schools Forum agreed to de-delegation last year for services in the table shared in the document for all primary and secondary maintained schools (i.e. excluding academies).

#### **Maintained Schools**

Mr Bryson highlighted in the past facility time for senior teacher trade union representatives based in schools had always been funded by centrally retained DSG funding. This report recommended this continued by approving de-delegation for

maintained schools.

- i. If this was not supported the budget would be delegated and schools would have to make their own arrangements for negotiating and consulting with the trade unions on changes to HR policies which would lead to duplication of effort and inconsistencies across schools.
- ii. Trade union representatives had a legal right to time off to participate in the collective bargaining arrangements of their employer and to represent their members. If the de-delegation were not agreed individual schools would have to bear the cost of the time off for the senior TU reps nominated by their union to participate in these discussions.
- iii. Due to increased time spent by unions on representing members the per pupil rate, which has not been uplifted for a number of years has been increased to £3 per pupil from £1.68 (secondary) and £1.51 (primary).

**Academies (receive funding for TU facilitation in their budget) - options:-**

- iv. They contribute in the same way as maintained schools do;
- v. They were invoiced for TU time spent in their establishment by the trade union representatives, which has been paid for by the LA, and then reimburse the LA accordingly. They invoice the authority for time spent by TU reps, employed by the academy, spent in maintained schools; or
- vi. They make their own arrangements with the trade unions for representatives from the trade unions amongst their own workforce.

Mrs Housley commented that HR had undertaken a detailed benchmarking exercise in relation to trade union charging, which revealed a significant variation in fees across local authorities. The revised fee proposed was considered highly competitive and reasonable when compared with the wider sector. Mrs Housley would be forwarding the benchmarking data to support this position and provide further context.

During the discussion, Mr Russell noted that only Stockton had explored a similar approach a few years ago. He also highlighted that additional work was required by the trade unions to further develop and refine their contribution in this area.

It was confirmed that the Local Authority continued to administer trade union information to academies, regardless of whether they have opted into the service. This process had already been completed for the current cycle.

Finally, clarification was provided regarding the employment status of trade union representatives, ensuring alignment with statutory responsibilities and organisational expectations.

## 11. ANY OTHER BUSINESS

### 11.1 Future Agenda Items

The following items would be added to the next agenda:

- a) High needs sub group update – Mrs Dyball to provide a presentation at each one.
- b) Appointment of Vice Chair

## 12. DATE AND TIME OF NEXT MEETING

RESOLVED that the next meeting of Schools Forum is due to be held on 10 November 2025 at 1.00 p.m.

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Signature of Chair

\_\_\_\_\_  
Date

Agenda