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SCHOOLS' FORUM

Day: **Tuesday**
Date: **1 December 2026**
Time: **10.00 am**
Place: **Remote Meeting via MS Teams**

Item No.	AGENDA	Page No
1.	**APPOINTMENT OF CHAIR AND DEPUTY CHAIR** To appoint a Chair and Deputy Chair for the 2026-2027 Academic Year	
2.	**APOLOGIES FOR ABSENCE** To receive any apologies for the meeting from Members of Schools' Forum	
3.	**DECLARATIONS OF INTEREST** To receive any declarations of interest from Members of Schools' Forum	
4.	**MINUTES** To consider the minutes of the meeting of Schools' Forum, which was held on 6 October 2026	1 - 6
5.	**SCHOOLS' FORUM SELF-ASSESSMENT** To consider the attached report of the Strategic Director of Children's Services and Strategic Director of Finance (S151 Officer)	7 - 54
6.	**SCHOOLS' FUNDING 2027-28** To consider the attached report of the Strategic Director of Children's Services and Strategic Director of Finance (S151 Officer)	55 - 62
7.	**ALTERNATIVE PROVISION INVESTMENT AND SEND SUFFICIENCY UPDATE 2027-28** To consider the attached report of the Head of SEND	63 - 68

From: Democratic Services Unit – any further information may be obtained from the reporting officer or from Natalie King, natalie.king@tameside.gov.uk, 0161 342 2316, to whom any apologies for absence should be notified.

8. DATE OF NEXT MEETING

To note that the next meeting of Schools' Forum is to be held in person (Committee Room 1, Tameside One) on Tuesday 19 January 2027 at 10am

From: Democratic Services Unit – any further information may be obtained from the reporting officer or from Natalie King, natalie.king@tameside.gov.uk, 0161 342 2316, to whom any apologies for absence should be notified.

SCHOOLS' FORUM

6 October 2026

Commenced: 10.00am **Terminated: 10.30am**

Present:	Steve Marsland	Maintained Primary Schools
	Lisa Gallaher	Maintained Primary Schools
	Lisa Lockett	Maintained Primary Schools
	Lyndsay Davison	Maintained Primary Schools
	Jo Lennon	Academy Primary Schools
	John Cooper	Academy Primary Schools
	Kirsty Rimmer	Academy Primary Schools
	Michelle Critchlow	Maintained Secondary Schools
	Andrea Din	Academy Secondary Schools
	Natalie Gilligan	Academy Secondary Schools
	Nigel Woodworth	Academy Special Schools
	Anne Morgan	Tameside Teachers Consultative Committee
	Lisa Richards	14-19 Sector
	Elaine Horridge	Church of England Diocese
	Councillor Roderick	Executive Member
	Emlyn Wright	Assistant Director, Education and Inclusion
	Wendy Lees	Schools Finance Manager
	Louisa Siddall	Senior Finance Manager
	Heather Green	Head of Finance, Children's Services
	Katie Twigg	Head of Access Services
	Ian Hilton	Observer
Apologies for absence:	Ed Mayell	Academy Secondary Schools
	Councillor Feeley	Executive Member

9 APPOINTMENT OF CHAIR AND DEPUTY CHAIR

Nominations were sought for both Chair and deputy Chair of Schools' Forum for the 2026-27 academic year.

RESOLVED

(i) That Andrea Din be elected as Acting Chair for the meeting

(ii) That the election of Chair and Deputy Chair of Schools' Forum for the 2026-27 academic year be deferred to the next meeting

10 DECLARATIONS OF INTEREST

There were no declarations of interest from Members of Schools' Forum.

11 MINUTES

Consideration was given to the minutes of the meeting of the School's Forum, which was held on 23 June 2026.

RESOLVED
That the minutes of the meeting of Schools' Forum, which was held on 23 June 2026 be approved as a correct record

12 SCHOOLS' FORUM MEMBERSHIP, CONSTITUTION AND TERMS OF REFERENCE

Consideration was given to a report of the Chief Executive, which outlined the terms of reference for Schools' Forum and the guiding principles and constitution for Schools' Forum.

It was noted that there were currently vacancies for the following representatives:

- 7 Academy Primary School representatives

Members agreed to share the vacancies across various forums and seek any interest from colleagues in advance of the next meeting.

RESOLVED

(i) That the Terms of Reference, Forum Principles, Constitution and membership of Schools' Forum be noted and approved for publication on the Council's website

(ii) That current vacancies within Schools' Forum membership be raised at suitable forums and groups, as appropriate

13 DEDICATED SCHOOLS GRANT MONITORING UPDATE 2026-27

Consideration was given to a report of the Strategic Director of Children's Services (Deputy Chief Executive) and Strategic Director of Finance (S151 Officer), which outlined the Dedicated Schools Grant (DSG) budget position for the financial year 2026-27, an update on the final Early Years outturn for 2025-26 and finance updates for 2027-28.

Members were advised that the 2026-27 Dedicated Schools Grant (DSG) settlement was £332.669m and was currently forecasting an overall in-year deficit of £26.987m, primarily driven by pressures within the High Needs Block.

Members noted that the Schools Block was forecasting a small in-year surplus of (£0.011m)

relating to unallocated growth funding, whilst the Central School Services Block was expected to break even.

Members were made aware that the High Needs Block was forecasting an in-year deficit of £27.630m due to continued growth in Education, Health and Care Plans (EHCPs), which would further increase the cumulative DSG deficit position.

It was acknowledged that the Early Years Block was forecasting a surplus of (£0.632m) after estimated funding adjustments, although this remained subject to changes in participation levels and future termly funding revisions.

Members were advised that the final 2025-26 Early Years funding adjustment had been confirmed in July 2026 and resulted in only a minor £0.002m variation from the position previously reported.

It was noted that the Early Years Block was initially forecasting a surplus of (£1.379m) before funding adjustments, reducing to an estimated surplus of (£0.632m) after the anticipated funding adjustment of £0.748m.

It was acknowledged that lower than anticipated participation in the 3 and 4-year-old universal entitlement, 2-year-old FRAS provision and under 2-year-old provision had contributed to the forecast surplus, alongside contingency funding that was not currently expected to be required.

Members were made aware that participation in the 2-year-old working parent entitlement had increased slightly and may require use of part of the contingency allocation.

Members noted that the Early Years Pupil Premium was forecast to exceed current funding allocations, although this pressure was expected to be offset by underspends within the Disability Access Fund.

It was acknowledged that the SEND Inclusion Fund and centrally retained budgets were currently expected to remain broadly within budget.

Members were advised that Early Years funding would continue to be adjusted termly throughout the year, with the first adjustment due in November 2026, and that both expenditure forecasts and DSG allocations remained subject to change.

In relation to the High Needs Budget, Members were advised that the latest forecast showed an in-year deficit of £27.630m, representing an improvement compared with the original budgeted deficit of £29.772m and a slight improvement on the June 2026 forecast.

Members noted that overall expenditure had reduced slightly since June, although there remained significant movement between placement sectors and a high degree of uncertainty around future placement numbers.

It was acknowledged that expenditure within mainstream schools, special schools, alternative provision and SEN units continued to increase due to rising demand and investment in additional local provision.

Members were made aware that expenditure on independent special schools and out-of-borough placements was forecast to be lower than budgeted, demonstrating the impact of investment in local mainstream, special school and SEN unit capacity.

Members noted that a number of new SEN units had either opened or were due to become fully operational during the current academic year, although one planned secondary SEN unit had been delayed until September 2027.

It was explained that Post-16 expenditure had increased since the June forecast due to higher placement growth and costs than originally anticipated.

Members were advised that EHCP numbers had continued to increase during the summer term, averaging 43 new plans per month. However, more recent data suggested growth may moderate, and the forecast had been revised to assume 28 new funded plans per month for the remainder of the year.

Members noted that forecast annual EHCP growth had reduced from 453 plans in the original forecast to 410 plans based on actual data and revised assumptions.

It was stated that the cumulative DSG deficit had increased from £43.873m at 31 March 2026 to a forecast £70.863m at 31 March 2027.

Members noted that the continued increase in the cumulative deficit was driven almost entirely by High Needs spending pressures.

It was explained that the statutory override allowing local authorities to exclude DSG deficits from their balance sheets was due to expire after the 2027-28 financial year. Members were also made aware that the Government had indicated that High Needs funding methodology would form part of wider SEND reforms and that funding allocations for 2026-27 remained capped at 2025-26 levels.

Members noted that, subject to Department for Education approval of the Council's SEND Reform Plan, Government proposals would provide funding equivalent to 90% of DSG deficits accrued up to 31 March 2026. They were also advised that the Council would still be required to fund at least 10% of historical and future DSG deficits locally, creating an estimated call on reserves of approximately £11m.

It was acknowledged that forecasts indicated continuing DSG deficits in future years unless significant changes were made to funding arrangements and/or expenditure levels.

Members were advised that detailed school and local authority National Funding Formula allocations for 2027-28 were expected to be published in Autumn 2026 and further updates would be reported to Schools Forum in December 2026. However, it was noted that no significant structural changes to the funding formula had been announced and that local authorities would continue to move local funding formula values progressively closer to National Funding Formula values.

It was explained that, from September 2026, Free School Meals (FSM) eligibility would be extended to all children from households receiving Universal Credit. Members noted that funding for 2026-27 would be provided through a separate grant and distributed based on increases in FSM eligibility recorded between the October 2025 and October 2026 school censuses.

Members were made aware that local authority allocations for the Early Years FSM Expansion Grant would be published in October 2026, with local authorities responsible for determining distribution arrangements.

Members were advised that the Department for Education had introduced a new Schools Budget Support Grant (SBSG) for 2026-27 to support the costs of teachers' and support staff pay awards. It was explained that the grant would be paid during 2026-27 before being incorporated into the National Funding Formula from 2027-28 onwards. They were also made aware that additional funding would be provided for early years and post-16 settings through separate grant arrangements.

It was stated that employer contribution rates to the Teachers' Pension Scheme would reduce from 28.6% to 17.6% from April 2027 and Members noted that funding allocations would be adjusted nationally to reflect the reduced costs, making the change broadly cost neutral for public sector employers.

It was acknowledged that corresponding reductions would also be reflected within High Needs, Early Years, CSSB and Post-16 funding allocations, with final details expected later in the autumn term.

Following the presentation of the report, discussion ensued in relation to changes in demand for EHCPS and Members asked for reassurance in terms of future predictions. It was explained that based on modelling using real-time data, the current situation had become more stable and current numbers suggested that it would be possible to accommodate the level of growth within the borough. Increased confidence in both team performance and specific data was also highlighted.

A question was also raised from the Academy Special Schools representative in relation to the matrix of need and it was explained that this would be followed up with some additional discussion and exploration of the data.

RESOLVED
That the contents of the report be noted

14 DATE OF NEXT MEETING

RESOLVED
That the next meeting of The Schools Forum be held remotely on Tuesday 1 December 2026 at 10am

CHAIR

Report to:	**SCHOOLS' FORUM**
Date:	1 December 2026
Reporting Officer:	Jill Colbert, Strategic Director of Children's Services Zoe Evans, Strategic Director of Finance (S151 Officer)
Subject:	**SCHOOLS' FORUM SELF-ASSESSMENT**
Report Summary:	Schools Forum Members were recently requested to complete a short survey based on the Schools Forum Self-Assessment checklist. The results of this assessment are summarised in this report, together with suggested actions.
Recommendations:	Schools Forum are invited to consider the results of the Self-Assessment and the proposed actions.
Corporate Plan:	This report relates to the People priority of the Council Plan
Policy Implications:	In line with Policy and the financial framework
Financial Implications: **(Authorised by the Strategic Director of Finance)**	There are no direct financial implications arising from this report. Schools Forum has both consultative and decision-making roles in respect of Local Authority school funding proposals.
Legal Implications: **(Authorised by the Director of Legal and Democratic Services)**	The Schools Forums (England) Regulations 2012 govern the composition, constitution and procedures of schools' forums in England. The Department for Education (DfE) and formerly the Education Skills Funding Agency (ESFA) have published a Schools Forum Operational and good practice guide, together with supplementary guidance on Schools Forum powers and responsibilities and guidance on Schools Forum structure. There are no direct legal implications arising from the recommendations contained in this report
Risk Management:	N/A
Access to Information:	**Non-Confidential** This report does not contain information which warrants its consideration in the absence of the Press or members of the public.

Background Information:

The background papers relating to this report can be inspected by contacting Heather Green

Telephone: 0161 342 3532

e-mail: heather.green@tameside.gov.uk

1. INTRODUCTION

1.1 The Schools' Forums (England) Regulations 2012 govern the composition, constitution and procedures of schools forums in England. The Department for Education (DfE) and formerly the Education Skills Funding Agency (ESFA) have published a Schools Forum Operational and good practice guide which is attached to this report at **Appendix 1**. In addition, published supplementary guidance on Schools' Forum powers and responsibilities is attached at **Appendix 2,** and guidance on Schools' Forum structure is at **Appendix 3**.

1.2 The Schools' Forum self-assessment toolkit was used to create a short survey and circulated to all Schools' Forum members and attendees on 4 November 2026 for completion by 16 November 2026. A total of eleven responses were received.

2. SELF-ASSESSMENT FEEDBACK

2.1 The survey consisted of 32 questions, including optional free text responses. The eleven responses were from the following sectors:

Sector Responses	
Maintained School Member	2
Academy School Member	5
Elected Member or Officer of the Council	2
Non School Member	1
No Sector response provided	1

2.2 Survey responses and comments for each section were as follows. All comments have been copied verbatim with one amendment to remove reference to sector representation to ensure anonymity of the responder. Summary messages and proposed actions are provided after each section.

Meeting Planning and Accessibility	Yes	No
Are Schools' Forum meeting dates scheduled well in advance and publicly communicated?	11	0
Are meetings scheduled to align with key decision-making dates (for example, school funding formula milestones)?	11	0
Are meetings held in accessible venues that enable observers to attend easily?	10	1
Comments		
I prefer the meetings to be remote rather than in person. *Meetings in Tameside One, though notionally accessible, have barriers that make attendance by observers more difficult from having to negotiate security to the lack of space in meeting rooms. Alternative venues, such as Dukinfield TH or Hyde TH would perhaps increase accessibility.*		

2.3 The majority of respondents considered meeting planning and accessibility to be satisfactory. There is one response and associated comment suggesting accessibility of meetings could be improved to enable attendance from observers.

2.4 Meeting dates and locations are published on the Council's website, together with contact details for the Forum clerk to enable observers to arrange attendance.

2.5 Schools' Forum members are asked to consider whether any further action is needed to improve meeting accessibility.

Transparency and publication of information	Yes	No
Is there a dedicated Schools' Forum webpage that is current and regularly updated?	8	3
Are agendas and supporting papers published at least six working days before meetings?	11	0
Are meeting papers published as a single downloadable document?	11	0
If additional papers are presented at meetings, are they published promptly afterwards?	11	0
Are draft minutes published within a reasonable timeframe (for example, within 2–3 weeks of the meeting)?	6	5
Are meeting minutes clear, concise and sufficiently detailed?	11	0
Comments		
There is a webpage but I am not sure how often it is updated. *I think that effective communication with schools and other stakeholders is essential. It is easier to communicate with schools as the headteachers hold regular meeting but e.g. it is more difficult to inform PVI schools about emerging issues. I think the website could be improved to inform members/ stakeholders about developments between meetings.* *Not sure if all discussion points and actions are always fully captured in the minutes.*		

2.6 Responses in respect of transparency and publication of information were broadly satisfactory. Some responses and comments suggest the need to review what information is published on the website and the timeliness of minutes.

Governance and Constitution	Yes	No
Is the Schools' Forum constitution clear and appropriate, including representation arrangements, member elections, terms of office, constitution review processes and management of non-attendance?	9	2
Do the agenda items reflect the Terms of Reference?	11	0
Is there an induction pack or training programme available for new members?	2	9
Is the election process transparent and undertaken by the appropriate representative groups?	9	2

Comments

I never received any training or information when I joined. I was asked to join by another Headteacher and then was added to a mailing list and started attending. As far as I know, I wasn't voted in and certainly didn't get any information about what to expect/training about the process.

I never received an induction.

I can't comment about non-elected members, but as an elected member I have not received any training or induction related to the School's Forum.

Regarding Q12 ...the constitution is clear but I feel that membership of the group could be open to more groups e.g. hospital schools, or groups representing more vulnerable pupils e.g. children looked after. I understand that Non-schools members may number no more than a third of a schools forum's total membership.

The place for the Catholic Diocese has not been filled for a while . I am aware that efforts have been made to fill this. If a school representative can not be found could the Catholic Education board be asked whether the place be taken up by a person in a wider field?

Need to encourage additional membership and engagement with forum.

2.7 The responses in this section identify a clear need for an induction process for new members. Forum are also asked to consider whether there is an appetite for any periodic training for Schools' Forum members.

Meeting Management and Participation	Yes	No
Do reports and papers clearly identify whether items are for information, consultation or decision?	11	0
Is it clear who forum members represent?	11	0
Does the Chair manage meetings effectively, encouraging balanced participation and preventing domination by individuals or sectors?	11	0
Is participation inclusive across all phases and member types?	10	1
Do members actively seek views from those they represent and provide feedback following meetings?	7	4
Comments		
I sometimes feel like things aren't explained clearly enough and there is lots of very subject-specific information/language used that can be difficult to understand. *I am not aware of views being provided.* *I find the Pre Forum meeting really helpful in providing information on school funding matters from the LA and DfE. It helps to clarify the information contained in the meeting papers. Thank you to the LA Officer/s who attend.* *I know that people who attend pre Forum meetings often consult with the people they represent following that meeting which enables them to consult on issues that need a vote at Forum. I would assume but don't know if information is shared following Forum meetings.* *Not sure if membership is fully representative/inclusive.*		

2.8 Responses for meeting management and participation were generally positive. Schools' Forum members are invited to consider whether there are opportunities to increase consultation and feedback with non-forum members.

Decision Making and Voting	Yes	No
When voting is required, is it clear who is eligible to vote?	10	1
Are voting arrangements and recording processes clear and transparent?	11	0
Is there a clear process for resolving tied votes?	10	1
Comments		
None		

2.9 The majority of respondents were satisfied with decision making and voting arrangements. The clerk to Forum will ensure that only those members who are eligible to vote are able to participate in voting items.

Continuous Improvement	Yes	No
Is the Operational and Good Practice Guide used regularly to review and improve forum effectiveness?	6	5
Comments		
Sometimes I think more context could be given around what the vote explicitly links to - e.g. - what is the ramification or voting yes or no against a specific item.		

2.10 Officers will seek to ensure that all reports are clear about voting items, why Forum are being asked to vote and the implications of the vote outcome.

2.11 It is proposed that the Operational and Good practice guide is reviewed on an annual basis going forward, together with a refresh of the self-assessment, to determine any areas for improvement.

Overall Assessment
What are the key strengths of the Schools' Forum?
Good school representation. *Information is shared that I don't feel I would have access to if I wasn't a member.* *Representations from different sectors, well-prepared minutes.* *The participation of a range of stakeholders and the ability to gather views on issues and cross feed those views that that allows.* *I have only attended 2 meetings so far but materials were clear and shared well in advance for each with opportunity for questions and discussion during the meetings.* *The direct involvement of key people from the LA (i.e. those who make decisions) which is important so that members who ask questions or raise queries usually get a swift answer.* *Mixture of meetings online and in person* *Reports are consistent with recommendations clearly set out at the beginning of each report* *Minutes are clear.* *Knowledgeable members, constructive discussion in meetings.*
What are the main areas for improvement?
I don't always get the invite to the pre meeting *I think the content can be confusing and, if you are not working in that field every day, e.g. - finance, it can sometimes be difficult to keep up and ensure you understand.* *Accessibility of meetings for observers.* *Challenge from forum and more transparency from the LA. There are times involving finance where I do not think honesty is always provided and a pre-decision is being presented.* *Improving uptake of places on Forum for all sectors. Support for new members (I had none and didn't really know what I was doing for a long time).* *I am not aware of any based on my limited involvement so far.* *Difficult for me to answer. The matters being discussed have very little bearing to my sector. Those from sectors more affected will have greater insight.* *To consider representation of non-school members.* *Need to attract new members and volunteers for Chair / Vice Chair*

What actions should be prioritised over the next 12 months?
I think we need a broader membership - and maybe some training. *Recruiting new members* *Advertising the work of the forum more widely and giving colleagues more of an insight into what forum is and why it exists* *Onboarding new members appropriately.* *If deemed relevant to the forum, falling roles in line with birth rate statistics and the impending impact on schools.* *Implementation of the SEND reforms - ensuring that everyone is heard and that messages are consistent and clear in relation to this. Regular and detailed updates in relation to this and safeguarding services.* *Communication in between meetings.* *Engagement and participation.*
Any other comments
None

2.12 The feedback on areas for improvement and key priorities for the next 12 months provide clear feedback in respect of training and induction for both new and existing members, recruitment of new members and engagement beyond forum membership, and consideration of other subject areas for forum.

3. PROPOSED ACTIONS AND NEXT STEPS

3.1 Based on the above conclusions and feedback, it is proposed that:

- Officers will ensure that new members of Schools' Forum are offered an induction which will cover the role of Schools' Forum and an introduction to School Funding and the Dedicated Schools Grant.

- Schools' Forum members are invited to consider whether there are any training requirements relevant to the role of Schools' Forum for the existing membership.

- Schools' Forum are invited to consider how new members can be encouraged to join Schools' Forum to fill the current vacancies, and to consider how engagement beyond the Schools' Forum membership could be improved.

4. RECOMMENDATIONS

4.1 As set out at the front of the report.

Education & Skills
Funding Agency

Schools Forum

Operational and good practice guide

March 2021

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Introduction

1. This guide is designed to provide local authority officers and schools forum elected members with advice and information on good practice in relation to the operation of schools forums.

2. It is organised in two sections:

- section 1 provides information on the constitutional and organisational requirements for schools forums
- section 2 covers a number of key aspects of the operation of schools forums at local level, drawing on good practice from a number of schools forums

3. GOV.UK contains details of all the announcements, documents and other information relating to school funding and schools forums, including the National funding formula (NFF) The website also has a range of useful links to other sites that may be of relevance to schools forum members.

4. A short guide to the schools forum for schools and academies, which may be helpful to stakeholders and the wider school family, is available on GOV.UK.

5. If you have any queries about the operation of schools forums please contact Education and Skills Funding Agency (ESFA) using the ESFA enquiry form.

Section 1 – schools forum regulations: constitution and procedural issues

Regulations

6. National regulations[1] govern the composition, constitution and procedures of schools forums. Local authorities can provide schools forum members with a copy of these regulations or alternatively they can be accessed at: http://www.legislation.gov.uk/uksi/2012/2261/contents.

7. 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 forums meetings to be held remotely. This includes (but is not limited to) telephone conferencing, video conferencing, live webcast, and live interactive streaming. Where a schools forum decides to hold a public meeting by remote means only, the forum should provide support or make alternative arrangements so that any interested parties who do not have telephone or online access can attend virtual meetings.

Schools forum powers

8. Schools forums generally have a consultative role. However, there are situations in which they have decision making powers. The respective roles of schools forums, local authorities and the DfE are summarised in schools forum powers and responsibilities. The overarching areas on which schools forums make decisions on local authority proposals are:

- de-delegation from mainstream maintained 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 a 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

[1] Schools Forums (England) Regulations 2012 (S.I. 2012/2261) (as amended)

- agreeing other centrally retained budgets, including for local authority statutory responsibilities (where these relate to maintained schools only, voting is by the primary, secondary, special and PRU members of 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 to be 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

- in each of these cases, the local authority can appeal to the Secretary of State if the schools forum rejects its proposal.

9. Local authorities should be aware that the provisions of the Local Government Act 2000 restrict the delegation of local authority decisions to Cabinet, a member of Cabinet, a Committee of Cabinet or an officer of the Council, which would not include schools forums. As a result the local authority cannot delegate its decision making powers to schools forum, for example, decisions on the funding formula.

10. Regulations state that the local authority must consult the schools forum annually in connection with various schools budget functions, namely:

- amendments to the school funding formula, for which the voting is restricted by the exclusion of non-schools members except for PVI representatives

- arrangements for the education of pupils with special educational needs in particular the places to be commissioned by the local authority and schools and the arrangements for paying top-up funding

- arrangements for the use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the local authority and schools and the arrangements for paying top-up funding

- arrangements for early years provision

- administrative arrangements for the allocation of central government grants paid to schools via the local authority

- There's no specific definition of these consultation requirements over and above the wording in the regulations. It's a matter for the local authority to decide on the appropriate level of detail it needs to generate a sufficiently informed response from schools forum.

11. Consultation must also take place when a local authority is proposing a contract for supplies and services which is to be funded from the Schools Budget and is in excess of the EU procurement thresholds. The consultation must cover the terms of the contract at least one month prior to the issue of invitations to tender.

12. The schools forum has the responsibility of informing the governing bodies of all schools maintained by the local authority of the results of any consultations carried out by the local authority relating to the issues in paragraphs 12 and 13 above.

13. Local authorities will need to discuss with the schools forum any proposals that they intend to put to the Secretary of State to:

- vary the MFG
- use exceptional factors
- vary pupil numbers (Secretary of State approval is no longer required for increases relating to changes in admission limits or reorganisations)
- allow additional categories of, or spending on, central budgets
- amend the sparsity factor
- vary the lump sum for amalgamating schools
- vary the protection for special schools and special academies
- move up to 0.5% from the schools block, where the schools forum do not agree, or move more than 0.5% from the schools block

Proposals will then need to be considered by the Secretary of State.

Membership

14. The Schools Forums Regulations provide a framework for the appointment of members, but allow a considerable degree of discretion in order to accommodate local priorities and practice. A quick guide to the structure of the schools forums is available.

15. There is no maximum or minimum size of a schools forum. Authorities will wish to take various issues into account in deciding the actual size, including the need to have full representation for various types of school, and the local authority's policy on representation of non-schools members. However, care should be taken to keep the schools forum to a reasonable size to ensure that it does not become too unwieldy.

16. Types of member: schools forums must have 'schools members', ‘academies member(s)’ if there is at least one academy in the local authority’s area and 'non-schools members'. Schools and academies members together must number at least two-thirds of the total membership of the schools forum and the balance between maintained primary, maintained secondary and academies members must be broadly proportionate to the pupil numbers in each category, so the structure of Forum should be regularly reviewed, we would suggest good practice is to review the membership as a standing agenda item at each meeting. Academies members must represent mainstream academies and, if there are any in the local authority area, special academies and alternative provision academies. There is no requirement for academies members to represent specific primary and secondary phases, but it may be encouraged to ensure representation remains broadly proportionate to pupil numbers. Academy members must be separately elected and designated from maintained school representatives, please see paragraph 28.

17. Schools forum members will need the skills and competencies to manage Forum business (as detailed in school forum powers and responsibilities) and to take a strategic view across the whole education estate whilst acting as representative of the group that has 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 forums would be to offer training to new or existing members who may benefit from this.

Term of office

18. The term of office for each schools member and academies member should be stipulated by the local authority at the time of appointment. Such stipulation should follow published rules and be applied in a consistent manner between members. They need not have identical terms – there may be a case for varied terms so that there is continuity of experience rather than there being a complete change in the membership at a single point. The term of office should not be of a length that would hinder the requirement for the structure of the schools forum to mirror the type of provision in light of the pace of academy conversions. Examples of how this may work include:

- holding vacancies until the schools forum structure is reviewed providing that this does not mean holding vacancies for an unreasonable length of time, for example, we would expect this vacancy to be filled for the following term
- increasing the size of the schools forum temporarily to appoint additional academy members, then deleting schools member posts at the end of a term of office or when a vacancy arises
- considering continuity of service; where an academy conversion affects the school of a current schools member, would academies consider appointing that person as an academies member

19. The length of term of office for non-schools members is at the discretion of the local authority. Schools and academies must be informed, within a month of the appointment of any non-schools member, of the name of the member and the name of the body that that member represents.

20. As well as the term of office coming to an end, a member ceases to be a member of the Schools Forum if he or she resigns from the schools forum or no longer occupies the office by which he or she became eligible for election, selection or appointment to the schools forum. For example;

- a secondary schools member must stand down if their school converts to an academy
- a schools member representing community primary school governors who is no longer a governor of a community primary school in the relevant local authority must cease to hold office on the schools forum even if they remain a governor of a school represented by another group or sub-group
- other situations in which membership of the schools forum ends are if a member gives notice in writing to the local authority and, in the case of a non-schools member, the member is replaced by the local authority, for example at the request of the body which the member represents

Schools members

21. Schools members represent specified phases or types of maintained schools within the local authority. As a minimum, schools forums must contain representatives of two groups of schools: primary and secondary schools, unless there are no primary or secondary schools maintained by the local authority. Middle schools and all through schools are treated according to their deemed status.

22. Where a local authority maintains one or more special schools the schools forum must have at least one schools member from that sector. The same applies to nursery schools and pupil referral units (PRUs).

23. The local authority then has discretion to divide the groups referred to in paragraph 16 and 17 into one or more of the following sub-groups:

- headteachers or headteachers' representatives in each group
- governors in each group
- headteachers or headteachers representatives and governors in each group
- representatives of a particular school category, for example, voluntary aided

24. Headteachers can be represented by other senior members of staff within their school. Governors can include interim executive members of an interim executive board. The sub-groups do not have to be of equal size; for example, there

may be more representatives of headteachers of primary schools than governors of such schools, or vice versa. The membership structure of the schools forum should ensure there is sufficient representation of each type of schools member in each group to ensure that debate within the schools forum is balanced and representative. As a minimum, there must be at least one representative of headteachers and one representative of governors among the schools members.

25. Whatever the membership structure of schools members on a schools forum, the important issue is that it should reflect most effectively the profile of education provision across the local authority to ensure that there is not an in-built bias towards any one phase or group.

Election and nomination of schools members

26. The relevant group or sub-group is probably best placed to determine how their schools members should be elected.

27. It's good practice for those who draw up the scheme to ensure that a vacancy amongst a represented group would be filled by a nominee elected according to a process that has been determined by all those represented in that group, for example, community primary school headteachers, or secondary school governors, ensuring that everyone represented has had the opportunity to stand for election and/or vote in such an election. The process must be restricted to the group in question; a headteachers phase group could only vote as a whole for headteacher members if the voting excluded academies, as academies members form a separate group.

28. It's not appropriate for a single person to be elected to represent more than one group or sub-group concurrently, for instance, if they were a governor at a primary and secondary school. They can stand for election from either group but can be appointed to represent only one of those groups.

29. The purpose of ensuring that each group or sub-group is responsible for their election process is to guarantee that there is a transparent and representative process by which members of schools forums are nominated to represent their constituents.

30. Appropriate support to each group or sub-group to manage their election processes should be offered by the clerk of a schools forum, or the committee/democratic services of a local authority. This may just include the provision of advice but may also consist of providing administrative support in actually running the elections themselves.

31. As a minimum, we would recommend that the clerk of a schools forum make a record of the process by which the relevant schools within each group and sub-group elect their nominees to the schools forum and be able to advise the Chair

of the schools forum and local authority on action that needs to be taken, where necessary, to seek new nominees.

32. In determining the process by which elections should be operated it is perfectly legitimate for a local authority to devise, in consultation with their schools forum, a model scheme for the relevant schools within a group or sub-group to consider and be invited to adopt. However, such a model scheme cannot be imposed on that body of schools: adaptations and/or alternative schemes may be adopted. A single scheme need not be adopted universally.

33. Care should be taken to ensure that every eligible member of a group or sub-group has an opportunity to be involved in the determination of their group's election process, is given the opportunity to stand for election if they choose to do so, and is involved in the election of their representative(s).

34. It would not be compliant with the regulations for the steering committee or Chair of a 'parent' group simply to make a nomination to represent their group or sub-group on a schools forum. Schools members must be elected, subject to paragraph 39 below.

35. The local authority may set a date by which the election should take place and must appoint the schools member if the election has not taken place by that date. The person appointed should be a member of the relevant group.

36. We would recommend that any scheme takes into account a number of factors:

- the process for collecting names of those wishing to stand for election
- the timescale for notifying all constituents of the election and those standing
- the arrangements for dispatching and receiving ballots
- the arrangements for counting and publicising the results
- any arrangements for unusual circumstances such as only one candidate standing in an election
- whether existing members can stand for re-election

37. In the event of a tie between two or more candidates, then the local authority must appoint the schools member instead. The local authority may decide to appoint someone else rather than one of the candidates and might wish to take into account the experience or expertise of the individuals, and the balance between the different types of school represented on the schools forum.

Election and nomination of academies members

38. Academies members must be elected by the proprietor bodies of the academies in the local authority's area, and they are probably best placed to determine the process. Academies members are there to represent the proprietor bodies of academies and are, therefore, not necessarily restricted to principals, senior staff or governors. The same factors should be taken into account as for the election of schools members, set out in paragraphs 28 to 39. For the avoidance of doubt, Free Schools, University Technical Colleges and Studio Schools are classed as academies for this purpose. There is no distinction between sponsored and converter academies.

39. There are three sub-groups for academy members: mainstream academies, special academies and alternative provision academies and it is for the proprietors of academies within each of these sub-groups to elect their representatives. It is not appropriate, therefore, for headteacher phase groups to determine representation unless the academy proprietors have agreed and even then the voting would need to exclude maintained school representatives. There is no requirement for academies members to be split into primary and secondary sub-groups. However, local authorities may wish to encourage academies to consider the pupil proportions across all academies when electing their representatives.

40. Where there is only one academy in a sub-group in the local authority's area, then their proprietor body must select the person who will represent them.

41. It is possible that a single person be appointed as an academies member to more than one schools forum, for example if an academy chain is located across multiple local authorities, providing they are elected on each occasion in accordance with the agreed election process for each separate schools forum.

42. As with schools members, the local authority may set a date by which the election should take place and must appoint an academies member if the election does not take place by that date, or if an election results in a tie between two or more candidates.

Non-schools members

43. Non-schools members may number no more than a third of a schools forum's total membership (excluding observers, see paragraph 58). A representative of providers of 16-19 education must be elected from those providers. This includes those in the FE sector (FE and sixth form colleges) and other post-school institutions that specialise in special education needs (SPIs), where 20% or more of their students reside in the local authority's area. As with academies the providers are probably best placed to determine the election process.

44. The local authority must appoint at least one person to represent early years providers from the private, voluntary and independent (PVI) sector. Early years

PVI settings need to be represented because funding for the free entitlement for three and four year olds and eligible two year olds comes from the Dedicated Schools Grant, and all settings are funded through the Early Years Single Funding Formula (EYSFF).

45. Before appointing additional non-schools members to the schools forum, the local authority must consider whether the Church of England and Roman Catholic dioceses situated in the local authority's area; and, where there are schools or academies in the area with a different religious character, the appropriate faith group, should be represented on the schools forum. If diocesan authorities nominate members for appointment as non-schools members they may wish to consider what type of representative would be most appropriate, schools-based such as a headteacher or governor, or someone linked more generally with the diocese, for example a member of the education board.

46. It's also good practice for local authorities to ensure that the needs and interests of all the pupils in the local authority are adequately represented by the members of a schools forum. The interests of pupils in maintained schools can be represented by schools members. Some pupils in a local authority, however, are not in maintained schools but instead are educated in hospitals, independent special schools and non-maintained special schools. Certain types of non-schools members can play an important role in representing the interests of these groups of pupils. They can also play a role in representing the interests and views of the services that support those groups of vulnerable and at risk pupils who nevertheless are on the roll of maintained schools, such as looked after children and children with special educational needs.

47. The purpose of non-schools members is also to bring greater breadth of discussion to schools forum meetings and ensure that stakeholders and partners other than schools are represented. Organisations which typically provide non-schools members are trades unions, professional associations and representatives of youth groups. Parent groups could also be considered. However, as there are clearly limited numbers of non-schools members able to be on a schools forum, care should be taken to ensure that an appropriate representation from wider stakeholders is achieved.

Other membership issues

48. There are three restrictions placed on who can be a non-schools member of a schools forum. The local authority cannot appoint:

- an elected member of the local authority who is appointed to the executive of that local authority (a lead member/portfolio holder) ('executive members')
- the Director of Children's Services or any officer employed or engaged to work under the management of the Director of Children's Services, and who does not

directly provide education to children (or manage those who do) ('relevant officer' (a) and (b))

- other officers with a specific role in management of and/or who advise on funding for schools ('relevant officer' part (c))

49. Schools forums have the power to approve a limited range of proposals from their local authority: the restrictions ensure that there is no conflict of interest between the proposing body (the local authority) and the approving body (the schools forum).

50. However, non-executive elected members and those officers who are employed in their capacity as headteachers or teachers and those who directly manage a service which provides education to individual children and/or advice to schools on, for example, learning and behavioural matters are eligible to be members of schools forums.

51. In the case of non-executive elected members, they may be a schools member (by virtue of them being a school governor), an academies member or a non-schools member. As a non-schools member they may be well placed to fulfil the broader overview and scrutiny role they have within the local authority in general.

52. However, the inclusion of non-executive elected members and certain officers is not a requirement. Many schools forums do not have such members on them and it is for each local authority and schools forum to consider how best to ensure the right balance of school and non-school representation on the schools forum, taking into account their local circumstances and preferences.

The role of executive elected members

53. A schools forum needs to ensure that there are systems in place for executive members of the Council to be aware of its views on specific issues and, in particular, any decisions it takes in relation to the Schools Budget and individual budget shares.

54. Executive members with responsibility for education/children's services or resources of the local authority are able to participate in schools forum meetings. By doing so such elected members are able to contribute to the discussion and receive first-hand the views of the schools forum: it is clearly good practice for this to be the case and the regulations provide the right for executive members to attend and speak at schools forum meetings. However, there is no requirement for this to happen so at the very least there should be clear channels of communication between the schools forum and executive members. Communication may also be assisted if schools forum members attended relevant Cabinet meetings as members of the public, for example, when the funding formula is decided.

Recording the composition of schools forums

55. Each local authority must make a written record of the composition of its schools forum detailing the numbers of schools members and by which group or sub-group they were elected, the number of academies members and the number of non-schools members, their terms of office, how they were chosen and whom they represent. This record should also indicate the term of office for schools and academies members. It would be helpful if this were published on the schools forum website so schools and wider stakeholders can easily find who their representatives are.

Observers

56. The Regulations provide that the Secretary of State can appoint an observer to attend and speak at schools forum meetings, for example a representative from the Education and Skills Funding Agency (ESFA). This allows a conduit for national policy to be discussed at a local level and provide access for schools forum to an additional support mechanism, for example, where there are highly complex issues to resolve.

Participation of local authority officers at meetings

57. Only specific officers can speak at meetings of the schools forum. These officers are:

- Director of Children's Services or their representative
- Chief Financial Officer or their representative
- any person invited by the schools forum to provide financial or technical advice
- any person presenting a paper to the schools forum but their ability to speak is limited to the paper that they are presenting

58. In the majority of cases schools forums are supported by a specific officer. In the course of their work, however, schools forums will be required to consider a whole range of issues and they may consider it appropriate that other officers attend for specific items of business. Where this is the case, the local authority should meet the schools forum's requests as far as possible. It is best practice to record attendance at meetings as well as membership to ensure elected members are attending and contributing to discussions.

Procedures

59. Many procedural matters are not prescribed in the regulations and are at the discretion either of the local authority or the schools forum itself. However, there are requirements in the regulations relating to:

- **Quorum:** A meeting is only quorate if 40% of the total membership is present (this excludes any observers, and it is 40% of the current membership excluding vacancies). If a meeting is inquorate it can proceed but it cannot legally take decisions (election of a Chair, or a decision relating to funding conferred by the funding regulations). An inquorate meeting can respond to local authority consultation, and give views to the local authority. It would normally be good practice for the local authority to take account of such 'unofficial' views, but it's not legally obliged to do so. In practice, the arrangements for meetings should be made to reduce the chance of a problem with the quorum. The quorum stipulation is in the regulations to help ensure the legitimacy of decisions
- **Election of a Chair:** Under the Regulations, if the position of Chair falls vacant the schools forum must decide how long the term of office of the next Chair will be. This can be for any period, but the schools forum should consider carefully whether a period exceeding two years is sensible. A long period will also cause problems if the member elected as Chair has a term of office as a member which comes to an end before their term of office as Chair ends. The schools forum must elect a Chair from amongst its own members, so it is not possible to elect an independent Chair. In addition any elected member of the local authority or officer of the local authority who is a member of a schools forum may not hold the office of Chair. Schools forums can also appoint to a position of vice Chair to provide cover if the Chair is absent or the post vacant
- **Voting procedures:** The Regulations provide that a schools forum may determine its own voting procedures save that voting on:
    - the funding formula is limited to schools members, academies members and PVI representatives
    - de-delegation is limited to the specific primary and secondary phase of maintained schools members
    - retaining funding for statutory duties relating to maintained schools only is limited to maintained primary, secondary, special and PRU members
- **The powers which schools forums:** have to take decisions on a range of funding matters increase the importance of clear procedures, for example, decisions are made on a simple majority or the threshold to be met if higher. These procedures should take account of any use of working groups by the schools forum, for example a decision might be taken by voting to accept and adopt a report by a working group (see paragraph 65). As part of any voting

procedure there should be clarity in the procedures for recording the outcome of a vote, and any resolutions a schools forum makes in relation to any vote taken

- **Substitutes:** the local authority must make arrangements to enable substitutes to attend and vote (where appropriate) at schools forum meetings. This applies to schools members, academies members and non-schools members. The arrangements must be decided in consultation with schools forum members
- **Defects and vacancies:** The Regulations provide that proceedings of the schools forum are not invalidated by defects in the election or appointment of any member, or the appointment of the Chair. Nor does the existence of any vacancy on the schools forum invalidate proceedings (see paragraph 61 on quorum)
- **Timing:** schools forums must meet at least four times a year
- **Meeting:** schools forums can meet remotely. This includes (but is not limited to) telephone conferencing, video conferencing, live webcast, and live interactive streaming.

60. Where the regulations make no provision on a procedural matter, local discretion should be exercised. It is for the local authority to decide how far it wishes to establish rules for the schools forum to follow, in the form of standing orders. While it is entitled to do so, it is of course good practice to allow the schools forum to set its own rules so far as possible.

Public access

61. Schools forums are more than just consultative bodies. They also have an important role to play in approving certain proposals from their local authority and are therefore involved in the decision making process surrounding the use of public money at local level. As a result schools forums are required to be open to the public. Furthermore papers, agendas and minutes must be publicly available well in advance of each meeting. It's good practice that notification that the schools forum is a public meeting is included on the website and papers are published at least a week in advance. Local authorities should ensure that the websites are accessible and easy to find.

62. Some schools forums already operate very much along the lines of a local authority committee. This is perfectly legitimate and will provide a consistent framework for the running of meetings that are open to the public, and the publishing of papers and agendas well in advance of the meeting and minutes published promptly as required under Regulation 8(13) of the Schools Forum Regulations 2012.

63. Local authorities should ensure that their schools forum clerk's contact details are published on their website and that it is clear to interested parties how they can attend the meeting remotely.

Working groups

64. It's open to a schools forum to set up working groups of members to discuss specific issues, and to produce draft advice and decisions for the schools forum itself to consider. The groups can also include wider representation, for example, an early years reference group can represent all the different types of provider to consider the detail of the early years single funding formula. The reference group would then be able to give its considered view on the local authority's proposals to the schools forum. The schools forum should not delegate actual decisions or the finalisation of advice to a working group, as this may have the effect of excluding legitimate points of view. These have proved effective for larger local authorities; examples of some working groups are for high needs and early years.

Urgent business

65. It's good practice for the local authority to agree with its schools forum an urgency procedure to be followed when there is a genuine business need for a decision or formal view to be expressed by the schools forum, before the next scheduled meeting. The local authority may of course call an unscheduled meeting; but it may also wish to put in place alternative arrangements such as clearance by email correspondence or some other means. Such instances should be avoided so far as possible but are legitimate provided all members of the schools forum have an opportunity to participate, the logistics provide a reasonable opportunity for consideration and the local authority policy on data security is not compromised.

66. It's not legal for the Chair to take a decision on behalf of the schools forum, no matter how urgent the matter in question; but a schools forum may wish to put in place a procedure for the Chair to give the local authority a view on an urgent issue.

Resources of the schools forum

67. The costs of a schools forum fall in the Central School Services Block of the Dedicated Schools Grant (DSG).

68. It's legitimate to charge the running costs of schools forums to this budget including any agreed and reasonable expenses for members attending meetings, the costs of producing and distributing papers and costs room hire and refreshments and for clerking of meetings. Beyond these costs some schools forums have a budget of their own to use for activities such as commissioning research or other reports.

Section 2 – effective schools forums

Introduction

69. As the previous section outlined, local authorities have responsibility for establishing schools forums. They also have an ongoing responsibility to provide them with appropriate support, information and guidance in carrying out their functions and responsibilities.

70. The following outlines some aspects of what local authorities and schools forums should consider in ensuring that their schools forums are as effective as possible. The pace of academy conversions in particular means that this significant sector must be properly represented and feel that it is able to play a meaningful part in the discussions of the schools forum.

71. Central to the effectiveness or otherwise of a schools forum will be the relationship between it and its local authority. The local authority will have a significant influence on this: the support it provides; the resources it devotes and the weight it gives to the views of schools forums all contribute to the nature of the relationship. There are therefore a number of characteristics of this relationship that are particularly important:

- partnership: having a shared understanding of the priorities, issues and concerns of schools, academies and the local authority
- effective support: the business of the schools forum is supported by the local authority in an efficient and professional manner
- openness: it's important that a schools forum feels it is receiving open, honest and objective advice from its local authority
- responsiveness: local authorities should as far as possible be responsive to requests from their schools forums and their members. Schools forums themselves should also be aware of the resource implications of their requests
- strategic view: members of schools forum should consider the needs of the whole of the educational community, rather than using their position on a schools forum to advance their own sectional or specific interests
- challenge and scrutiny: schools forums may be asked to agree to proposals from their local authority that will have an effect on all schools and academies in the local area. The extent to which schools forums can scrutinise and challenge such proposals is an important aspect of their effectiveness

72. The characteristics identified above are just some of the aspects that will contribute to an effective schools forum. The following provides more detail on some of the specific issues that local authorities and schools forums may wish to consider in thinking about their own arrangements.

Induction of new members

73. When new members join the schools forum appropriate induction materials should be provided. These might include material relating to the operation of the schools forum together with background information about the local and national school funding arrangements. Typically they might comprise:

- the constitution of the schools forum
- a list of members including contact details and their terms of office
- any locally agreed terms of reference explaining the relationship between the schools forum and the local authority
- copies of minutes of previous meetings
- the programme of schools forum meetings for the year
- the local schools forum web address

74. This Operational and Good Practice Guide, suitably supplemented by local material, should also be provided to new members on their appointment.

75. Where there is sufficient turnover of schools forum members in any particular year the local authority may wish to organise a one-off induction event to brief new members. Such an event would usefully include an outline of the role of the schools forum and the national funding arrangements for schools and local authorities. It might also include an explanation of the local funding formula and any proposals for review. The opportunity could also be taken to explain the main reporting requirements for school and local authority expenditure.

Training

76. Ideally schools forum members should be able to use some of the budget set aside for schools forum running costs for accessing relevant training activities. Some training will be provided by officers of the local authority but members may wish to attend national or regional events, the costs of which, where necessary, can be supported from the schools forum budget. Local and national bodies have a key role to play in developing the competencies of forum members.

77. Training will need to be provided in response to any changes in the role of the schools forum and national developments in respect of school funding, to ensure that members can be fully effective when detailed discussions are taking place.

Agenda setting

78. The process by which the agenda for a meeting or cycle of meetings is set is in many respects one of the key determinants of the effectiveness or otherwise of a schools forum.

79. The frequency and timing of meetings of the schools forum should be agreed in advance of each financial or academic year; these should take into consideration deadlines for the local authority such as disapplication requests and the submission of the authority proforma tool (APT). It's good practice to publish the dates of meetings on the schools forum website. In drawing up this cycle of meetings, in consultation with the schools forum, the local authority should provide a clear overview of the key consultative and decision-making points in the school funding cycle. These will be drawn from a combination of national and local information and should inform the basic agenda items that each meeting needs to cover. For instance meetings will need to be scheduled at appropriate points to enable the schools forum to consider the outcomes of local consultations and national announcements.

80. Although the business of schools forums must be open and transparent, it is recognised that from time to time items of a confidential nature will need to be discussed. It's recommended that authorities apply the same principles that they apply to Council or Cabinet meetings when judging an item to be confidential and adopt similar practices for dealing with those reports in the meeting, for example placing them together at the end of the agenda.

Preparation for a schools forum meeting

81. It's vital that the schools forum is transparent, open and has clear communication lines to all of the members that are represented. This ensures the wider school family are aware of the business discussed, the impact on their setting and the reasons for the decisions.

82. The vast majority of a schools forum's business will be transacted on the basis of prepared papers. It is therefore important that these are concise, informative and produced in a timely and consistent manner. Recommendations should be clearly set out at the beginning of each report. It's also helpful if the front of the report confirms whether the report is for information or decision and who is eligible to vote where relevant.

83. It's good practice for the schools forum and local authority to agree a standard for papers. It is usual for papers to be dispatched at least one week prior to the meeting at which they will be discussed to allow members to consider them and if necessary canvass views from the group they are representing. Papers should be published on the local authority's website at this time to enable representations to be made to schools forum members.

84. Consistency in the presentation of papers also contributes to the effectiveness of meetings: it helps set the tone of meetings, facilitate the engagement of all members and signal the importance the local authority attaches to the work of the schools forum. Ideally such a standard should be agreed between the schools forum and local authority. The publishing of papers as a single pdf file is helpful as it saves time and avoids accessing multiple documents both in advance of, and during, the meeting. An Executive Summary of the reports can provide schools forum members and members of the public with an overview of the agenda and the decisions required.

85. The publishing of papers on a publicly available website well in advance of the meeting ensures that all interested parties are able to access papers. Some schools forums ensure that each represented group meets in the days immediately prior to the schools forum meeting to ensure the agenda is discussed and schools forum members are properly briefed by the group they represent. Although on occasions it's inevitable that schools forums will receive late, or tabled reports it does create some difficulty for members as they will not have been able to seek the views of those they represent.

86. Schools forums can consider adopting a flexible arrangement for time immediately prior to the meeting. For example it could be used for training of new members, or as a drop-in session for members to ask items of clarification, or for members to meet without officers to discuss the agenda.

Chairing the schools forum

87. The Chair of a schools forum plays a key role in setting the tone, pace and overall dynamic of the schools forum. They should provide an environment within which all members are able to contribute fully to discussions and guide the schools forum to making well informed decisions.

88. The relationship between the Chair and the local authority is therefore vital. The Chair should be very clear on the substance of the agenda items, understand the issues involved and the decisions and/or actions that need to be taken in respect of School Forum business. It's good practice for there to be a pre-meeting between the senior officer of the local authority supporting the schools forum and the Chair of the schools forum to ensure that all the issues are clearly understood.

89. Equally, the Chair has the responsibility of representing the views of the schools forum back to the local authority: for instance, they should, where appropriate, take the initiative to make suggestions for improvements to the way the business is conducted, and, in exceptional cases and with support of the members of the schools forum take the view that they do not have sufficient information on which to base a decision and ask that an item is deferred until further information is available. However, in doing so, the Chair and schools forum should be fully aware of the consequences of deferral.

90. The independence of the schools forum is paramount. Enhancing the role of Chair to a paid position, rather than the reimbursement of reasonable expenses, could blur the lines of independence. Similarly, if the Chair undertakes significant work for the local authority in another capacity, for example as an external consultant, they could be viewed as equivalent to an officer of the local authority.

91. Local authorities could consider if sharing contact details of the schools forum Chair with neighbouring authorities would be helpful for peer support and improving networking opportunities.

Clerking the schools forum

92. Clerking of a schools forum should be seen as more than just writing a note of the meeting. A good clerk provides an invaluable link between the members of the schools forum, the Chair and the local authority. It's a role often undertaken by an employee of the local authority though we would recommend consideration is given to the use of an independent clerk.

93. Clerks should manage the logistics of the meeting in terms of ensuring dispatch of papers and producing a note from the meeting. In considering the style of meeting notes consideration should be given to making them intelligible enough for non-attendees to get a sense of the discussion as well as clearly indicating the conclusion and action agreed in relation to each agenda item. Verbatim reports of a schools forum's discussion, however, are unlikely to be very useful. Schools forums may consider whether a simple action log should be maintained by the clerk to ensure all action points agreed are followed up.

94. Beyond this a good clerk can:

- provide the route by which schools forum members can access further information and co-ordinate communication to schools forum members outside of the formal meeting cycle
- respond to any queries about the business of the schools forum from headteachers, governors and others who are not on the schools forum themselves
- be responsible for ensuring contact details of all members are up to date
- maintain the list of members on the schools forum and advise on membership issues in general
- assist with the co-ordination of nomination or election processes run by the constituent groups
- keep the schools forum website up to date, for example by posting latest minutes and papers

- monitor, on a regular basis, the schools forum and general schools funding pages on the GOV.UK website; and arrange for the distribution of any relevant DfE information to schools forum members
- if appropriate, provide technical advice in relation to the schools forum regulations and in relation to the operation of a schools forum's local constitution
- organise, operate and record any voting activity of the schools forum in line with the provisions of its local constitution

95. Not all of these tasks may be able to be undertaken by the schools forum clerk. However, each one is important and there should be arrangements in place to ensure they are discharged adequately.

Good practice for schools forum meetings

96. Schools forums should ensure there is a clear debate of all agenda items. Whilst sub-group meetings are valuable in working through detailed issues, schools forums should consider that the level of debate held at the schools forum meeting and recorded in the minutes will be the official reflection of the level of challenge and discussion on each issue.

97. The use of nameplates for schools forum members also showing which group they are representing can be helpful to members of the public and presenters of papers. In addition the use of coloured cards or coloured nameplates can be helpful when specific members of a schools forum are eligible to vote on specific items, for example, voting on de-delegation or changes to the funding formula.

98. Consultations with the schools forum are a key responsibility of a local authority, ranging from the funding formula to the letting of contracts. Each consultation will be different and depend on the subject being consulted on, but local authorities should consider the following factors as good practice for effective consultation:

- plan and consult early
- allow reasonable timescales for response (as Forum members may need to consult the groups they represent)
- an open and honest approach
- fully inclusive
- allow for ongoing dialogue
- provide feedback

- clear communications

Meeting notes and recording of decisions

99. A vital part of the effective operation of a schools forum is to ensure that an accurate record of the meeting is taken. This must include the clear recording of votes where there are contrary views. Recommendations to, and decisions of, schools forums must be clearly set out.

100. Notes or minutes of each schools forum meeting should be produced and published on the local authority website as soon after the meeting as possible to enable members and others to see the outcome of any discussions and decisions and/or votes. It is good practice to formally agree the accuracy of the note and minutes at a subsequent meeting but the publication of the draft minutes should not be delayed as a result. We would recommend that a log of the decisions is published within three working days of the meeting, and the draft minutes within 10 working days so that interested parties can access them and consult on them, if necessary, before the next meeting.

101. In order to provide clarity about representation at each meeting, it is good practice for the minutes to record the group and/ or subgroup that each member represents against their name.

Communication

102. Communication to the wider educational community of the discussions and debates of, and decisions made by, the schools forum is fundamental to their effective operation. The more schools and other stakeholders know about the proceedings of the schools forum, the more their work will be an important and central part of the context of local educational funding. This is particularly important given the decision making role that the schools forum has. Local authorities should consider the operational differences between the types of stakeholders and plan their communications accordingly. For example ensuring effective communications across the PVI sector may be more difficult than with schools, which are more likely to have existing channels of communication for example, headteacher meetings.

103. Each schools forum should therefore be clear what its channels of communication are. It is fundamental that each member of schools forum represents the views of the group or sub-group that they represent and that all those with an interest in funding work together to ensure that their views are taken into account. Therefore communications directly between members and those they represent is essential; professional associations and phase groups could be suitable channels. This will ensure that schools forum members have an ongoing dialogue with the constituents of their group or sub-group and are therefore well able to represent their

views at schools forum meetings. However, the schools forum should also consider additional communication processes. These could include:

- drawing schools' attention to the fact that all its agendas minutes and papers are publicly available on the local authority's website (this should include the publication of formula consultation documents)
- an annual report on the proceedings of the schools forum
- attendance by the Chair, or other schools forum member, at other relevant consultative or management groups such as any capital working group; or senior management meetings of the Children's Services Department
- a brief email to all schools, early years providers and other stakeholders after each schools forum meeting informing them of the discussions and decisions with a link to the full papers and minutes for further information
- a schools forum newsletter can be a less formal and more interesting way of communicating forum business and raising the profile of the schools forum and its members

News updates

104. Most, but not all, members of the schools forum will already be in receipt of regular information on school funding matters from the local authority and DfE. Other schools forum members should be copied into such information flows so that they can be kept abreast of developments between meetings.

105. Many local authorities have already established dedicated schools forum websites on which they post key information for schools forum members and other interested parties and updated on a regular basis.

Education & Skills
Funding Agency

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Schools forum powers and responsibilities

A summary of the powers and responsibilities of schools forums.

Function	Local authority	Schools forum	DfE role
Formula change (including redistributions)	Proposes and decides	Must be consulted [voting restrictions apply - see schools forum structure document] and informs the governing bodies of all consultations	Checks for compliance with regulations
Movement of up to 0.5% from the schools block to other blocks	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Contracts (where the LA is entering a contract to be funded from the schools budget)	Proposes at least one month prior to invitation to tender, the terms of any proposed contract	Gives a view and informs the governing bodies of all consultations	None

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Function	Local authority	Schools forum	DfE role
Financial issues relating to: • arrangements for pupils with special educational needs, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding • arrangements for early years provision • administration arrangements for the allocation of central government grants	Consults annually	Gives a view and informs the governing bodies of all consultations	None
Minimum funding guarantee (MFG)	Proposes any exclusions from MFG for application to DfE	Gives a view	Approval to application for exclusions

Function	Local authority	Schools forum	DfE role
De-delegation for mainstream maintained schools for: • contingencies • administration of free school meals • insurance • licences/subscriptions • staff costs – supply cover • support for minority ethnic pupils/underachieving groups • behaviour support services • library and museum services • School improvement	Proposes	Maintained primary and secondary school member representatives will decide for their phase. Middle schools are treated according to their deemed status	Will adjudicate where schools forum does not agree LA proposal
General Duties for maintained schools • Contribution to responsibilities that local authorities hold for maintained schools **(please see operational guide for more information)**	Proposes	Would be decided by the relevant maintained school members (primary, secondary, special and PRU).	Adjudicates where schools forum does not agree LA proposal
Central spend on and the criteria for allocating funding from: • funding for significant pre-16 pupil growth, including new schools set up to meet basic need, whether maintained or academy	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
• funding for good or outstanding schools with falling rolls where growth in pupil numbers is expected within three years			
Central spend on: • early years block provision • funding to enable all schools to meet the infant class size requirement • back-pay for equal pay claims • remission of boarding fees at maintained schools and academies • places in independent schools for non-SEN pupils • admissions • servicing of schools forum • Contribution to responsibilities that local authorities hold for all schools	Proposes	Decides	Adjudicates where schools forum does not agree LA proposal
Central spend on: • capital expenditure funded from revenue – projects must have been planned and decided on prior to April 2013 so no new projects can be charged • contribution to combined budgets – this is where the schools forum agreed prior to April 2013 a	Proposes up to the value committed in the previous financial year and where expenditure has already been committed.	Decides for each line	Adjudicates where schools forum does not agree LA proposal

Function	Local authority	Schools forum	DfE role
contribution from the schools budget to services which would otherwise be funded from other sources • existing termination of employment costs (costs for specific individuals must have been approved prior to April 2013 so no new redundancy costs can be charged) • prudential borrowing costs – the commitment must have been approved prior to April 2013	Read establishing local authority DSG baselines for more information.		
Central spend on: • high needs block provision • central licences negotiated by the Secretary of State	Decides	None, but good practice to inform forum	None
Scheme of financial management changes	Proposes and consults the governing body and Head of every school	Approves (schools members only)	Adjudicates where schools forum does not agree LA proposal
Membership: length of office of members	Decides	None (but good practice would suggest that they gave a view)	None
Voting procedures	None	Determine voting procedures	None

Function	Local authority	Schools forum	DfE role
Chair of schools forum	Facilitates	Elects (may not be an elected member of the Council or officer)	None

Education & Skills Funding Agency

Schools forums structure

A summary of the structure of schools forums.

Category	Schools members	Academies members	Non-school members
Represented groups	Where the local authority maintains the following types of school, they must be represented on the schools forum: • Primary Schools • Secondary Schools • Special Schools • Nursery Schools • PRUs	At least one academies member must be a representative of mainstream academies, which includes free schools, UTCs and Studio Schools. In addition, there must be one member for each of the following groups (if such exist in the local authority area): • Special academies, including free schools • Alternative provision academies, including free schools	16 to19 providers Early years Private, Voluntary and Independent (PVI) providers Before considering other groups, the local authority must consider diocesan representation

Published September 2018

Category	Schools members	Academies members	Non-school members
Type of member	Within each of the five groups above there could be the following types of member: • Headteachers (or their representative) • Governors • Headteachers and Governors • In overall terms there must be at least one headteacher (or their representative) and one governor	Any	Any
Schools forum structure	Schools members and academies members must comprise at least two thirds of the schools forum membership Primary schools, secondary schools and academies must be broadly proportionately represented on schools forum, based on the total number of pupils registered at them	Schools members and academies members must comprise at least two thirds of the schools forum membership Primary schools, secondary schools and academies must be broadly proportionately represented on schools forum, based on the total number of pupils registered at them	
Voting	Only primary representatives can	No voting on de-delegation or the	No voting on de-delegation or the

Category	Schools members	Academies members	Non-school members
	vote on primary school dedelegation Only secondary representatives can vote on secondary school dedelegation All schools members can vote on the scheme for financing schools All schools members can vote on any other schools forum business, including the consultation on the funding formula. Maintained school members can vote on items relating to general duties and retained duties.	scheme for financing schools All academies members can vote on any other schools forum business, including the consultation on the funding formula. Academy members can vote only on retained duties.	scheme for financing schools Only PVI representatives can vote on the consultation on the funding formula. All non-school members can vote on any other schools forum business
Elected by	The relevant sub-group of the relevant type of school e.g. primary school governor representatives are elected by the governors of primary schools, secondary school headteachers are elected by the headteachers of secondary schools.	The relevant proprietors of academies elect for their group, e.g. mainstream academies, special academies and alternative provision academies	Election only applies to the representative for the 16 to 19 providers, who is elected by all eligible 16 to 19 providers

Local authority appointment of members	Only if no election takes place by the agreed date or in the event of a tie	Only if no election takes place by the agreed date or in the event of a tie	Can appoint a 16 to19 representative only if no election takes place by the agreed date or in the event of a tie. For all other non-schools members the local authority appoints, but it's good practice to seek nominations from the relevant bodies

Other attendees who are permitted to contribute to a schools forum meeting:

- an observer appointed by the Secretary of State
- the Chief Financial Officer
- the Director of Children's Services
- officers providing financial & technical advice to schools forum
- the Executive Member for Children's Services
- presenters (restricted to the paper they are presenting)
- the Executive Member with responsibility for resources

Report to:	**SCHOOLS' FORUM**
Date:	1 December 2026
Reporting Officer:	Jill Colbert – Strategic Director of Children's Services (DCS) Zoe Evans – Strategic Director of Finance (S151 Officer)
Subject:	**SCHOOL FUNDING 2027/28**
Report Summary:	An update report on expected arrangements concerning the Dedicated Schools Grant (DSG) funding for 2027/28.
Recommendations:	Schools' Forum is recommended to note and feedback on the proposed approach to the DSG funding for 2027/28.
Corporate Plan:	Education finances effectively support the People priority and Children's Services, providing support to children and their families to give them the best start in life and build the foundations for a happy, healthy and fulfilling future.
Policy Implications:	In line with policy and the financial framework.
Financial Implications:	These are the subject of the report.
(Authorised by the Strategic Director of Finance)	The Dedicated Schools Grant (DSG) is a ring-fenced grant solely for the purposes of schools and pupil related expenditure. The allocation of the High Needs element of the DSG grant is insufficient to meet current spending or growth in number of pupils requiring support.
Legal Implications: **(Authorised by the Director of Legal and Democratic Services)**	The legal framework for school budgets is set out in sections 45-53 of the School Standards and Framework Act 1998 and accompanying regulations. The School and Early Years Finance (England) Regulations 2014 provide the framework for the funding of maintained schools including how the local authority may allocate their schools budget. The School and Early Years Finance Regulations 2014 gave effect to the decision to reform school funding through a simplified local formula with greater delegation to schools and new arrangements for funding pupils with high needs. In addition, the School and Early Years Finance Regulations set out the requirements for determining the Early Years budget. The Department for Education has also issued Operational Guidance for local authorities relating to school and early years budget setting to support Council's compliance with the Regulations.

Risk Management:	The correct accounting treatment of the Dedicated Schools Grant is a condition of the grant and procedures exist in budget monitoring and the closure of accounts to ensure that this is achieved. These will be subject to regular review. There is insufficient funding allocated to the borough to meet the cost of Education in borough.
Access to Information:	**NON-CONFIDENTIAL** This report does not contain information, which warrants its consideration in the absence of the Press or members of the public.
Background Information:	The background papers relating to this report can be inspected by contacting Heather Green Telephone: 0161 342 3532 e-mail: heather.green@tameside.gov.uk

1. INTRODUCTION

1.1 The Department for Education (DfE) have indicated that the publication of the school and local authority level national funding formula (NFF) allocations for 2027/28 will take place in Autumn 2026, although as of 16 November 2026 no date had been specified.

1.2 2027/28 Funding Formula proposals for Tameside will be published with the School Forum papers on 11 January 2027, in advance of the School Forum meeting on 19 January. The deadline for submission of the APT, the document the DfE require regarding the schools block funding formula for 2027/28, is 22 January 2027. This is in line with prior year submission deadlines, however, consultation time available will be limited due to the relevant data required being released in the autumn term.

1.3 It is intended that proposals will be circulated for consultation in December, but precise timing will be dependent on when the NFF allocations are published by DfE.

2. NFF POLICY 2027/28

Schools Block

2.1 On 2 October 2026, the DfE published a summary policy document outlining key elements of the mainstream schools NFF for 2027/28. The key headlines from this policy document included:

- **NFF Structure Remains Unchanged**
  The 2027/28 NFF maintains the same funding structure as 2026/27. Existing pupil-led factors (e.g. deprivation, low prior attainment, EAL, mobility) and school-led factors (e.g. lump sum, sparsity, premises) remain in place. The Area Cost Adjustment (ACA), Minimum Per-Pupil Levels (MPPLs) and funding floor protections will continue.

- **Schools Budget Support Grant 2026 Rolled into Core Funding**
  The Schools Budget Support Grant 2026 (SBSG26), introduced to support pay and cost pressures, will be incorporated into the NFF. This makes the funding a permanent part of schools' baseline allocations rather than a separate grant.

- **Teachers' Pension Funding Adjustment**
  Employer Teachers' Pension Scheme contribution rates will reduce from 28.6% to 17.6% from April 2027. School funding allocations will be reduced to reflect the lower employer costs. DfE states this will not reduce overall sector spending power as costs and funding are reducing in parallel.

- **Free School Meals Expansion**
  Universal Credit recipients became eligible for FSM from September 2026. Due to the lag in census data used for NFF calculations, this increase will not be

reflected in initial 2027/28 NFF allocations. Additional funding will instead be provided through Schools Block DSG allocations in December 2026.

- **Inclusive Mainstream Fund**
  The inclusive mainstream funding that was allocated for the first time in 2026/27 will cover a three-year spending period and is expected to continue at a similar level in 2027/28 and 2028/29.

- **Local Authority Funding Formula Requirements**
  Local authorities (LAs) must continue moving local funding factors at least 10% closer to NFF values where not already aligned. Formula factors within ±2.5% of NFF values are considered to be "mirroring" the NFF. There are no changes to mandatory or optional factors.

- **Schools Block Transfers**
  LAs will continue to be allowed to transfer up to and including 0.5% of their schools block to another block. Block transfers up to 0.5% require Schools Forum approval and there is an expectation from DfE that transfers will align to the local SEND reform plan.

- **SEND Funding Development**
  A new optional Local SEND Inclusion Factor will allow LAs to transfer funding from the High Needs Block into mainstream school budgets to support inclusion and earlier intervention.

High Needs Block

2.2 The DfE has not published any further guidance on the funding formula for the High Needs Block of the DSG. In 2026/27 the High Needs Funding Formula was temporarily suspended and allocations held at the same level as for 2025/26 (with the exception of the rolling in of Core Schools Budget Grant (CSBG) and other legacy funding). It is anticipated that this will continue for 2027/28, SBSG26 allocations will be rolled into the high needs block in 2027/28 and there will be a teachers' pension funding adjustment. Local Authority (LA) level allocations of High Needs Funding are expected to be published in December 2026.

Early Years Funding

2.3 The DfE ran a consultation on proposed changes to the Early Years entitlements funding system from July to September 2026. The consultation closed on 14 September with responses expected in the Autumn 2026, followed by national funding guidance and allocations for 2027/28. At the time of writing this report, the consultation response has not yet been published and timelines for publication of funding allocations remain unclear.

Central School Services Block (CSSB)

2.4 There has been no publication in relation to the CSSB and as such it is expected the funding allocation to LAs will be in line with previous years, adjusted for the SBSG grant and teachers' pension adjustments (as discussed in 2.1) in relation to centrally employed teachers.

3. SCHOOLS BLOCK 2027/28

3.1 On the basis of the Policy document issued by DfE in October, the LA intends to adopt a similar approach to that taken in 2026/27, subject to affordability and the impact of reduced funding for Teachers Pensions Costs. This is expected to include:

- Tameside MBC funding rates to be adjusted by an equivalent percentage rate to the NFF rates. There will be no changes to the structure of the funding rates.
- A Minimum Funding Guarantee (MFG) of 0% will be applied to protect schools receiving at least the same pupil led funding as 2026/27 (after adjusting for the impact of the reduction in the Teachers Pension Cost).
- No gains cap is expected to be applied.
- The LA will continue to recover the full delegated PFI affordability factor as in previous years. Work has taken place with DfE during 2026 to review the PFI funding factor. DfE have indicated that this will continue at the level of the 2025/26 national funding formula and will not be increased back to previous levels. This leaves a shortfall on the PFI factor funding which will continue to be met through a local PFI factor, subject to affordability.
- Business Rates will continue to be funded based on estimated values, removed from the allocations and retained by the DfE to pay directly to the billing authority (Tameside MBC).
- The Tameside MBC Schools and Academy Pupil Growth Criteria adopted in June 2019 will continue to be applied to calculate any explicit growth funding. The LA is not expecting to allocate any growth for 2027/28.
- The LA are reviewing whether a falling rolls policy will be required for 2027/28 and relevant information on this will be included in the consultation.

4. SCHOOLS BLOCK TRANSFER

4.1 As in 2026/27, the LA intends to ask Schools Forum to approve a transfer of 0.5% from the Schools Block to the High Needs Block to continue to strengthen the LA's Alternative Provision (AP) and inclusion offer, in line with the Local SEND reform plan.

4.2 Continued investment will support the shift away from dependence on long term placements and towards earlier intervention, outreach support and strengthened mainstream inclusion. Further detail is set out in the SEND paper which is a separate item on this agenda.

5. HIGH NEEDS BLOCK

5.1 In 2026/27 DfE temporarily suspended the High Needs National Funding Formula and capped funding at the 2025/26 allocations. It is anticipated that this approach will also apply for 2027/28 and remain similar to 2026/27 including:

- If the funding formula remains suspended, there will be no update to reflect special and AP pupil numbers, and no inflationary uplift.
- DSG will be updated in summer 2027 with changes to recoupment as result of the 2027/28 high needs change process.
- DSG will continue to be updated with any adjustments relating to import and export adjustments.
- Funding previously allocated through the SBSG26 will be rolled into the High Needs Block and added to the 'Legacy Funding pot'.
- There will be a reduction in the High Needs Block funding to reflect the reduction in Teachers Pension Costs from April 2027. This will be reflected through a reduction in legacy funding.

Top Up Rates

5.2 Following a number of changes and increases to Top Up Funding Rates in 2025/26, all Top Up Funding Rates were increased by 2% in 2026/27 in recognition of the inflationary pressures facing schools, despite there being no uplift to the High Needs DSG allocation.

5.3 For 2027/28, the LA is minded to apply an increase to the Top Up Rates, following similar principles to that adopted in 2026/27 and in recognition of the cost pressures facing schools. Any uplift to Top Up Rates will likely contribute to the deficit on the High Needs Block, assuming funding allocations to the LA follow a similar approach to 2026/27.

High Needs DSG Deficit and High Needs Stability Grant

5.4 In October 2026, the LA received confirmation that it would receive High Needs Stability Grant of £39.486m, equivalent to 90% of the overall deficit on the DSG at 31 March 2026. Due to the statutory override remaining in place until March 2028, this additional funding cannot be allocated to the DSG balance until 1 April 2028 and will be held in reserve until the end of the 2027/28 financial year.

5.5 For deficits arising in the 2026/27 and 2027/28 financial years, DfE have stated 'that local authorities can expect them to take 'an appropriate and proportionate approach', though it will not be unlimited and future support will take into account local authorities' successful delivery of their approved Local SEND reform plan'.

6. CONCLUSION

6.1 There are no significant changes expected to the funding settlement for 2027/28. It is the LA's intention to consult with schools in December following the DfE publication of allocations. A further update on DfE announcements and timelines for consultation will be provided at school forum meeting on 1 December 2026.

7. RECOMMENDATIONS

7.1 As set out at the front of the report.

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Report to:	**SCHOOLS' FORUM**
Date:	1 December 2026
Reporting Officer:	Hilary Cook, Head of SEND
Subject:	**ALTERNATIVE PROVISION INVESTMENT AND SEND SUFFICIENCY UPDATE 2027/28**
Report Summary:	This report outlines the impact of Schools Block investment in Alternative Provision and inclusion services, seeks support for the continuation of the 0.5% block transfer in 2027/28 and provides an update on progress to increase local SEND capacity and sufficiency.
Recommendations:	Schools' Forum are asked to note the content of the report, and feedback on the proposals for the continuation of the 0.5% block transfer to support Alternative Provision and Inclusion.
Corporate Plan:	This report relates to the People priority of the Council Plan
Policy Implications:	In line with Policy and the financial framework.
Financial Implications: **(Authorised by the Strategic Director of Finance)**	SEND and Alternative Provision is funded from the High Needs Block of the Dedicated Schools Grant (DSG). The allocation of the High Needs element of the DSG grant is insufficient to meet current spending or growth in number of pupils requiring support. In previous years Schools Forum has approved the transfer of 0.5% from the Schools Block of the DSG to support expenditure in the High Needs Block. The Council receives capital grant funding through the High Needs Capital allocation to support the expansion of local SEND capacity. Capital investment decisions to create additional High Needs places are subject to approval by Executive Cabinet.
Legal Implications: **(Authorised by the Director of Legal and Democratic Services)**	High Needs funding is allocated to local authorities via the High Needs Block of the Dedicated Schools Grant (DSG), as outlined in the financial implications above. This funding supports the delivery of statutory duties under the Children and Families Act 2014, particularly in relation to children and young people with special educational needs and disabilities (SEND). Expenditure from the High Needs Block must comply with the conditions of the DSG grant and the School and Early

	Years Finance (England) Regulations, ensuring that funds are used solely for eligible schools and pupil-related purposes. There are no direct legal implications arising from the recommendations contained in this report.
Risk Management:	Failure to provide sufficient places for children with additional needs in the borough will result in additional costs for the Council through more expensive specialist placements and lead to children learning in inappropriate settings
Access to Information:	**Non-Confidential**
Background Information:	The background papers relating to this report can be inspected by contacting Hilary Cook, Head of SEND, by: Telephone: 0161 342 4433 e-mail: Hilary.Cook@tameside.gov.uk

1. INTRODUCTION

1.1 The Council has an ambition that children within the borough should have a school place as close to home as possible which is able to meet their individual learning needs, and as many children as possible have a suitable place within a mainstream setting.

1.2 School place planning is a statutory duty of the local authority. There has been continued demand for a number of years for Specialist Provision driven by unprecedented growth in Education Health and Care Plans (EHCPs) in the borough.

1.3 The local SEND Reform Plan, approved by DfE in September 2026, focuses on making support easier to access, helping children earlier and giving schools the tools and specialist advice they need to meet a wider range of needs in mainstream settings.

2. DEDICATED SCHOOLS GRANT (DSG) FUNDING

2.1 For the 2026/27 financial year, Schools Forum approved a 0.5% transfer from the Schools Block to the High Needs Block of the DSG to strengthen the Local Authority's Alternative Provision (AP) and inclusion offer.

2.2 This investment has supported a strategic shift away from dependence on long-term placements and towards earlier intervention, outreach support and strengthened mainstream inclusion, consistent with the Department for Education's vision for Alternative Provision as set out within the SEND and AP reforms currently under consultation.

2.3 The funding has increased capacity for children and young people at risk of suspension, permanent exclusion or placement breakdown, enabling earlier support and reducing escalation into more costly and restrictive provision. It has also increased support for children and young people who are unable to attend school due to medical needs, emotionally based school avoidance (EBSA) and other complex barriers to attendance.

2.4 In addition, the Council has appointed to two new posts to focus on AP commissioning, delivery and quality assurance, and has commissioned the Studybugs platform to improve attendance monitoring across AP settings. An additional Access Team leader is also strengthening work around exclusions and placement planning.

2.5 This investment complements the development of the Experts at Hand model, including a universal SEMH outreach offer that provides schools with earlier advice, intervention and capacity building to support children and young people within mainstream settings wherever possible.

2.6 Given the continuing demand for Alternative Provision, increasing levels of need and the national policy direction towards outreach, intervention and inclusion, it is proposed that Schools Forum continue to support a 0.5% transfer from the Schools Block to the High Needs Block for 2027/28. Maintaining this investment will enable the further development of preventative and outreach-based approaches, strengthen support for schools managing pupils with emerging SEMH needs, and continue to expand capacity for children and young people at risk of exclusion or disengagement from education.

3. SEND SUFFICIENCY UPDATE

3.1 Tameside continues to increase local SEND capacity through the commissioning of additional places across specialist schools, resource bases and post-16 provision. A summary of commissioned places is provided in the tables below.

Commissioned Places - AP	Commissioned Places Sept 26	Commissioned Places Sept 27	Change
Tameside Alternative Provision Academy (AP Places)	115	115	0

Commissioned Places - Special	Commissioned Places Sept 26	Commissioned Places Sept 27	Change
Cromwell High School	158	162	4
Hawthorns School	246	260	14
Oakdale School	166	166	0
Samuel Laycock School	250	265	15
Thomas Ashton School	120	120	0
Tameside Alternative Provision Academy (EHCP Places)	50	50	0
Total Places	**990**	**1023**	**33**

Commissioned Places - ARP's	Commissioned Places Sept 26	Commissioned Places Sept 27	Change
Ashton West End Primary Academy (new Sept 26)	20	22	2
Corrie Primary School	20	20	0
Dane Bank Primary School	10	10	0
Dixons Pennine Academy	12	12	0
Endeavour Academy	12	12	0
Greenfield Primary Academy (12 new Sept 26)	36	36	0
Greenside Primary School	22	22	0
Manor Green Primary Academy	12	20	8
Oakfield Primary and Moderate Learning Difficulties Resource Provision	24	24	0
Rosehill Methodist Primary Academy	15	15	0
Russell Scott Primary School	5	5	0
Silver Springs	26	26	0
St Georges C of E Primary School	12	16	4
St James Church of England Primary school	16	16	0
St Mary's RC Primary School	8	8	0
St Stephen's RC Primary School (new Sept 26)	16	16	0
Total Places	**266**	**280**	**14**

3.2 Work is continuing with schools across the borough to develop additional specialist capacity through the expansion of existing resource bases and SEND provision, alongside the establishment of new provision where this is appropriate and aligned to identified need. This programme of work is intended to support increasing demand for specialist placements and improve the availability of local educational provision for children and young people with SEND.

3.3 Capital grant funding has been allocated to two projects at All Saints Catholic College and Laurus Ryecroft, which will create an additional 15 and 42 specialist resource places respectively. Capital works are programmed to take place during the current academic year, with both provisions expected to open from September 2027.

3.4 Detailed proposals continue to be developed in partnership with schools, and it is anticipated that a Cabinet report will be presented in the New Year, setting out the wider programme of developments, associated timescales and the expected impact of the planned expansion of specialist capacity for the 2027/28 academic year.

3.5 During 2026/27, the Local Authority increased commissioned places across all sectors, including a significant expansion of post-16 capacity at Tameside College to meet

growing demand from young people with EHCPs. This includes the continued development of local pathways for young people with SEMH needs and those aged 19+, cohorts that remain significant drivers of placements within Independent Non-Maintained and Specialist School (INMSS) provision.

3.6 These developments support the SEND Sufficiency Strategy by increasing local capacity, reducing reliance on out-of-borough and high-cost specialist placements, and ensuring more children and young people can access appropriate provision closer to home. Further development of local post-16 pathways remains a strategic priority in order to strengthen sufficiency, support preparation for adulthood and improve outcomes for young people with SEND.

4. CONCLUSION

4.1 The Local Authority continues to respond proactively to increasing demand for SEND and Alternative Provision through a combination of investment in early intervention, strengthened inclusion support and the expansion of local specialist capacity.

4.2 The proposed continuation of the 0.5% transfer from the Schools Block to the High Needs Block for 2027/28 will support the further development of preventative and outreach-based approaches, reducing reliance on more costly and restrictive provision wherever possible.

4.3 Alongside this, the ongoing expansion of specialist schools, resource bases and post-16 pathways will increase local sufficiency, enable more children and young people to access appropriate provision closer to home and contribute to improved outcomes. Schools Forum is asked to note the progress made during 2026/27 and support the proposed continuation of investment to sustain and further develop the borough's inclusive education offer.

5. RECOMMENDATIONS

5.1 As set out at the front of the report.