LEICESTERSHIRE SCHOOLS' FORUM

The Leicestershire Schools' Forum to be held on **Thursday, 6 November 2025 at 2.00 pm via Microsoft Teams.** The primary contact for the forum arrangements is as follows:

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Please see below for the agenda for the meeting.

AGENDA

Item		Paper
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Minutes of a meeting of the Leicestershire Schools' Forum held via Teams on Tuesday, 9th September 2025.

Chair/Vice-Chair

Martin Towers	Academy Secondary Governor
Suzanne Uprichard	PRU Representative & Maintained Primary School Governor

Attended

Nerinder Samaria	LCC Strategic Finance Manager
Salik Khan	LCC Education Finance Manager
Jane Moore	LCC Director of Children and Family Services
Tim Browne	LCC Assistant Director for Education, SEND & Inclusion
Beth Clements	LCC Head of Service – Education & Inclusion
Rebecca Wakeley	LCC Senior Education Effectiveness Partner
Renata Chantrill	LCC Head of Service – Business Support, Education Quality, Performance and Planning
Michelle White	LCC Head of Service – SEND & Children with Disabilities
Carolyn Shoyer	Diocese of Leicester Director
Rebecca Jones	Maintained Primary Governor
Rosie Browne	Academy Primary Headteacher
Kelly Dryden	Academy Special School Headteacher
Dr Jude Mellor	Academy Secondary Headteacher
David Warwick	DNCC Representative
Peter Leatherland	Academy Secondary Headteacher
Alison Ruff	Maintained Primary Headteacher
Dan Cleary	Academy Secondary Headteacher
Phil Lewin	Maintained Primary Headteacher
Ed Petrie	Academy Primary Headteacher
Adina Murataj	Maintained Primary Governor

Observing

Victoria Edwards	LCC Executive Head of Oakfield
Sarah Davis	Chief Finance Officer – Oak MAT
Rachel Simpson	LCC Clerk for Leicestershire Schools' Forum
Callum Payne	LCC Senior Business Support Assistant

Apologies for absence

Val Moore	Primary Academy Governor
Kath Kelly	Secondary Academy Headteacher
Jo Beaumont	Primary Maintained Headteacher
Beverley Coltman	PVI Early Years Representative

1. **Apologies for absence/Substitutions.**

   Apologies received from Val Moore, Jo Beaumont, Kath Kelly and Beverley Coltman.

   Lauren Chalton, Robert Martin, Simon Grindrod, Lisa Craddock and Felicity Clarke did not attend.

2. **Minutes of the Meeting held on 10/06/2025 (previously circulated) and matters arising.**

   Renata Chantrill advised that she was in attendance at the June meeting but it was not captured on the Minutes.

   Rachel Simpson confirmed circulation of the Forum Meeting dates for the next academic year had been actioned.

   No further amendments were requested and the minutes of the meeting held on 10th June were agreed as a correct record.

3. **School's Deficit Policy (report is attached)**

   Salik Khan presented on the Deficit Budget Policy Report advising that the purpose of today's forum is to note the planned development of the policy for Autumn 2025. No formal decision is required, the report is just guidance for schools to have a formal process in place.

   It is statutory for all schools to have balanced budgets and any school that doesn't, is operating unlawfully according to DFE guidance. The policy has been created to help support schools in their approach to manage deficits and aims to ensure the identification of financial risks. Key features of the policy that were noted include:

   - The policy distinguishes the two situations where there's a managed deficit:
     - The first situation is where a school has a short term or one-off issue causing the deficit. In this instance, the expectation is that the school will return to a balanced budget by the following year.
     - The second situation is a licence deficit, which applies to deeper or structural financial issues, where school will need to produce a detailed business case and repayment plan.

   - A three-year spending plan is usually proposed with flexibility for five years in exceptional circumstances. The business case looks at the root causes, critical planning, staffing, risk assessments and the educational impact.

- There is a proposal for budget resubmission in October 2025 to consolidate all school forecasts into a single set of planning, ensuring a consistent baseline and enabling fair comparisons across schools.
- There is a section in the policy on roles and responsibilities. Governing bodies remain accountable for approving budgets, with the IT chair and Business Manager being responsible for producing forecasts and providing a framework for planning and monitoring compliance. A new element to the policy is around the Schools in Financial Difficulty Panel which includes representatives from Education, Finance, HR and School Effectiveness. The panel has proposed quarterly meetings with an additional meeting every May to review new licence deficits. A rollout plan is being developed for implementation at the Local Authority. The new policy is proposed to be sent out after schools' forum.
- Briefings will be held for teachers, governors and business managers after budget resubmissions. Schools identified with deficits will receive targeted advice during these sessions, and they will have access to tools, templates and financial planning support.
- The policy aligns with the existing scheme for financing schools, who are required to cooperate with audits, demonstrate value for money and rate changes involving staffing, organisation and complete the equality impact.

Carolyn Shoyer, representing the Diocese of Leicester, welcomed the policy and the clarity it provides and requested that it was considered whether there could be a consultation with the religious authority when a maintained Church of England School was identified. They currently receive this information as soft data when visiting schools, but Carolyn was wondering if this was something the Diocese could receive more systematically.

Rebecca Jones agreed that the clarity and consistency the policy will provide is well received although she raised a concern over the time it will take for schools who it applies to. Rebecca noted that these schools are mostly likely in a deficit due to lack of resources and this could add to the issue. Rebecca also questioned whether there will be additional support to smaller schools who do not have a dedicated Business Manager and if there will be a cost attached to this.

Salik Khan advised that there is a proposal for a hub with examples of what a good, structured business case would look like and this would be complemented by proposed webinars. There are ongoing discussions proposing clusters of schools with similar parameters to be set up with a peer support model. In terms of costs, Salik advised that he will investigate this further with the Trading Service team and what that might possibly look like.

Phil Lewin was in agreement that a standardised approach would be beneficial and also noted that when looking at the timescales, it is important to factor in time for the Governing Bodies to be informed and hold relevant meetings.

Suzanne Uprichard echoed concerns around smaller schools not having the infrastructure or spare capacity for anyone to provide the information as quickly as is being requested. With October being really close, it could be very tight for most governing board to meet and discuss signing off on any potential issues.

Nerinder Samaria commented on the importance in terms or messaging that the School Deficit Policy is not trying to reinvent the wheel but aims to create a coordinated and consistent approach within the legal framework. It will provide a consistent baseline and form the foundation for supporting evidence and analysis. The structure will enable more effective and informed decision-making across schools and the Local Authority. All comments and concerns will be taken offline to coordinate effective next steps.

Tim Browne expressed his thanks for the work involved in putting the paper together, and re-iterated that it's part of a wider approach developed in response to concerns raised by schools about support, processes and communication. A significant effort has gone into shaping a coherent strategy, with the wider group looking at school reorganisation and viability across the system, ensuring effective engagement across the whole school system. The approach reinforces the commitment to fulfilling statutory responsibilities for Local Authority maintained schools, taking a holistic view of the education system, aiming to ensure its long-term sustainability and deliver the best possible outcomes for children and young people.

The LA made the following recommendation:

1.1 Schools' Forum is asked to note the Local Authority's plan to deploy the Deficit Budget Policy for maintained schools from Autumn 2025 and to offer any comments that would improve clarity, practicality and proportionality in implementation.

There were no further questions or comments from members on this report.

4. <u>2026/27 Schools' Block Transfer (report is attached)</u>

NB This was originally set as Agenda Item 4 but following discussions during the meeting, it was agreed to move item 6 to item 4, and therefore this was subsequently discussed as agenda item 5

Salik Khan presented the report to the Forum, the purpose of which is to note the intention to transfer 0.5% of Schools Block funds to the High Needs Block for the SEND Investment Fund and approve launching a formal consultation with all schools. The rationale for the transfer is not about covering the High Needs Block deficit, it is a proactive investment aiming to build capacity within mainstream schools and to support pupils with SEMH needs.

The high needs block deficit remains a major financial challenge for the Council. While the proposed transfer doesn't directly reduce the deficit, it supports early intervention and demand management. The Local Authority's involvement in the DfE's *Delivering Better Value* programme reflects our commitment to sustainable solutions. The SEND Investment Fund is key to this work, helping mainstream schools build capacity for SEMH support. This enables timely intervention in familiar settings, reducing the need for costly specialist placements.

Due to the delayed autumn budget, we're working to a tight timeline, aiming to submit any requests for the Secretary of State by mid-November. A full consultation will be launched across all schools via multiple channels to encourage engagement and shape the final allocation.

Rebecca Jones expressed scepticism about the consultation process, suggesting that even if schools oppose the funding transfer, the Secretary of State may approve it regardless, so it feels like schools won't have a real say. Schools are being asked to create recovery plans to manage deficits, yet the transfer reduces their budgets further, making recovery harder. It feels like the local authority are underfunded, so in order to fulfil roles in their services, they are taking more money from individual schools, making it more difficult for them to recover budgets. Essentially, schools are losing their ability to choose how they're spending their money.

Salik Khan noted the Local Authority are not taking money away from schools but redirecting it through the High Needs Block to create greater support there. Salik acknowledged Rebecca's concerns and reiterated that the structure is mandated by national policy therefore needs further conversation at a national level.

Dr Jude Mellor noted that Leicestershire is severely underfunded nationally, an issue which needs addressing further. She questioned what schools could do collectively to advocate for better funding for our Local Authority. Dr Mellor also ask what are the steps and processes between the transfer proposal decision and the Secretary of State's final decision?

Tim Browne advised that the process is we go out to consultation, the information returned will then be shared widely and is followed by a cabinet review at local level. Ultimately, the decision on a request for transfer of funds is a political decision made by the Leicestershire County Council Lead Member and Cabinet. Tim advised that he has met with a number of Headteachers over the summer and relayed all the concerns to our politicians. There is a political process in place and physical representation can be made if someone wanted to choose to do so.

Rebecca Jones questioned how schools can make an informed decision in the upcoming consultation when the impact from last year's transfer hasn't yet been experienced or measured? Schools are being asked to give feedback on a funding transfer without having seen any delivery of the initiative or its impact.

Salik Khan confirmed the consultation will follow a similar process to last year, feedback will be gathered from the sector and presented at the next Schools Forum in early November and the deadline for this application is 17th November. The consultation is about the transfer itself, not the outcomes. The fund has a strategic approach, and whilst there have been some teething issues, schools need to trust in the process and know that support will be delivered.

Dan Cleary questioned the ethics of proceeding without clear evidence to the equality impact assessment. Whilst the cabinet could take the view that the assessment can be undertaken on the information we have got, this could be problematic, especially given the potential impact on children with disabilities. Dan commented on the proposed SEND Inclusion Fund package that Renata has presented, pointing out that whilst it looks really good, it's not credible to say whether this is the case until it has been tested, which puts the Cabinet in a difficult position. Dan suggested as a member of the forum, that we should seek advice on the matter.

Tim Browne acknowledged that there is a timing issue with the consultation period but believes that the package being offered is a really strong offer which has been driven by the needs and wishes of schools. Whilst the impact of this won't be known in time for the application, as far as possible, there will an equality impact assessment of any proposal that goes to cabinet.

Dr Jude Mellor asked if the consultation can also consider the tangible losses schools have faced due to the fund transfer. She highlighted the need to balance potential benefits of the fund with the measurable losses schools have already experienced, such as reduced staffing and resources.

Tim Browne advised that the consultation is an open opportunity for schools to express their concerns and opinions. The cabinet welcomes and values all views and opinions put forward, and these will be considered in the decision-making.

The LA made the following recommendation:

1.1 That the Schools' Forum notes the Local Authority's intention to propose a transfer of funding 0.5% of funding from the Schools Block to the High Needs Block in 2026/27, specifically for the continued investment in the SEN Investment Fund.

1.2 That the Schools Forum approves the Local Authority to proceed with a formal consultation with all schools regarding the proposed 0.5% transfer, recognising its vital role in sustaining and enhancing the capacity of mainstream schools to support pupils with SEMH needs.

Yes: 10 **No: 2** **Abstained: 0**

1.3 That the schools Forum provides comments on the proposed approach and the mechanisms for ensuring an equitable distribution of the transfer across schools and acknowledges the Local Authority's intention to seek Secretary of State approval should local consensus not be achieved following the consultation.

There were no further questions or comments from members on this report.

5 <u>EHCP Funding Transition (report is attached)</u>

NB This was originally set as Agenda Item 5 but it was discussed and agreed in the meeting to move Item 6 to 4 so this subsequently was discussed as agenda item 6

Renata Chantrill talked through the paper which outlined the proposal to consult with schools on transitioning to a banded model for EHCP funding.

Summary of EHCP Banding Model Consultation Update:

- The consultation aims to engage schools on the proposed shift from the current funded hours model to a needs-led banding model for EHCP funding in Leicestershire.
- There is no national standard for EHCP banding; the proposed model is locally developed through the Change Programme partnership, with colleagues across Leicester City and Rutland.
- The model uses needs descriptors to assign funding bands and has been co-produced with Leicestershire schools to reflect local support needs.
- Initial soft testing with schools yielded positive feedback, prompting a wider consultation.
- The consultation is split into two stages:
  Stage 1 (launched today) – Six-week consultation on proposed needs descriptors and banding approach (ending mid-October).

Stage 2 (late autumn to early spring) – Consultation on funding allocations for each band. Proposed to run across the winter and into early spring.

- This phased approach allows us to fully consider the needs descriptors and what the proposed funding attached to each banding may look like.
- A survey will be distributed via the Headteacher Briefing and discussed in meetings over the next six weeks.
- Feedback will focus on clarity, practicality, and overall support for transitioning to the new model.
- A report will be presented to the Schools Forum in November summarising initial consultation findings and outlining next steps in terms of whether we progress to the second stage.

Carolyn Shoyer raised her concerns about the proposed approach to banded funding for EHCPs. She clarified that local authorities are not legally required to specify funding the Education Healthcare Plans, only to ensure the provision outlined is funded. She argued that children with EHCPs often have highly complex and individual needs that may not be adequately captured by a banded funding approach. Carolyn expressed further concern that the shift could leave children at risk if the funding bands do not align with their actual needs and could lead to increased conflict with parents and carers who may feel their child's provision is not appropriately funded or is misrepresented.

Phil Lewin noted the current challenges schools face when dealing with parental requests for increased EHCP funding. The existing approach of "funded hours" often makes conversations with parents difficult when trying to explain support levels.
Even when schools aim to be inclusive, parents are increasingly bypassing the school and going directly to the Local Authority to request EHCPs. Phil questioned whether the proposed banded funding system would help reduce these challenges or if parents would continue to challenge funding decisions directly with the local authority.

Renata clarified that the proposed banded funding model for EHCPs would not change the way that children's needs are currently assessed, these will still be assessed individually, as they are now. Instead of assigning a notional number of support hours, funding will be linked to a band that reflects the child's assessed needs. This approach will mean that Schools will receive a pot of funding without rigid hour allocations, allowing them to use it more flexibly to meet the child's needs.

Dr Jude Mellor expressed her gratitude for this approach finally being looked at, it is something that secondary school headteachers as a group have been asking for. She acknowledged that it will be a difficult process but genuinely believes it will help schools to be in a better place to collectively support parents of children who have an EHCP.

Tim Browne noted that in discussions with schools, it appears they are in favour of this approach and the flexibility it provides them when looking at how to best meet the needs of their children and young people.

Martin Towers questioned whether the proposal includes plans to measure the financial impacts on schools that currently have lots of EHCPs, to assess whether the move from funded hours to banded funding will be financially beneficial or not.

Renata advised that the financial modelling of the proposed banding system will be looked at as part of stage 2 of the consultation. Schools will be able to evaluate whether this move will be beneficial or detrimental to them individually. The overall goal is for the transition to be cost-neutral, meaning some EHCP's may receive slightly more funding, and some slightly less than before, in order to align with the new funding bands proposed. The second stage of the consultation will explore how to manage any financial impacts to ensure the approach is fair and well understood.

Pete Leatherland expressed his agreement with Dr Jude Mellor that the proposed approach is one that many schools have been asking for and is a great idea.

The LA made the following recommendation:

Schools' Forum is asked to
2a. Note the proposed consultation and timeline.
2b. Provide feedback on the proposed banded model and consultation approach.
2c. Support the engagement of schools in the consultation process.

There were no further questions or comments from members on this report.

6 <u>SEND Investment Fund (report is attached)</u>

NB This was originally set as Agenda Point 6 but it was discussed and agreed in the meeting that it would make more sense to go through this information as agenda item 4 first before discussing the Schools Block Transfer.

Renata Chantrill presented on the Paper which addresses the work to date on the SEND Investment Fund and how the Local Authority are looking to spend the funds to support children and young people with social, emotional and mental health needs within the 2025/26 academic year.

The purpose of looking at the paper in forum was to update on where we are and discuss the confirmed offers due to be launched in mainstream educational settings within Leicestershire. The offers have been co-produced with a working group of schools to ensure funding is being spent in the most impactful areas. Work is now being completed to finalise these offers and launch them during the next term.

The following summary of offers was provided:

- Fully funded SEMH training will be available for all maintained schools - Areas include training on Trauma Informed Approaches, ADHD and Emotionally Based School non-attendance. It was confirmed that a contribution towards backfill costs would be provided from the fund to help with attendance for full-day courses.
- Primary in-school Alternative Provision and Outreach Support – offer includes an extension to existing Oakfield support to provide additional drop-ins and increased capacity to help reduce existing waiting time to access support. Also, there will be a pilot for primary in-school alternative provision support via new Graduated Response practitioners, and a team of Speech and Language therapists to support the Oakfield Outreach offer which will cover both Primary and Secondary schools.
- Secondary in-school Alternative Provision an Outreach Support – The Oakfield Outreach offer will also be available for Secondary schools as this has been identified as a particular gap. There we be a new Multi-Disciplinary Outreach team run through the new Oakfield Secondary, who will be going into schools to help support children and young people.

- Introduction of Online Consultations focusing on supporting professionals working with children and young people experiencing emotionally-based school non-attendance. This will be led by the Educational Psychology Services.
- Introduction of a directory of support and advice for schools to help easily signpost available services. It will provide clear guidance on how to access support, book training courses and engage with new initiatives.

There will be a number of impact measures put in place to help monitor the effectiveness and relevance of these offers. The measures include gathering early initial feed back from schools to enable ongoing tailoring and improvement of services if something is not working.

Further reports on progress will be brought to School’s Forum over the next 12 months around how these measures are being implemented and if they are resulting in the required impact.

Carolyn Shoyer expressed her support and encouragement for the proposals offered, which also resonates with the work of the Diocese. It was also mentioned that the Children’s Commissioner, Rachel de Souza had published “The Children’s Plan: The Children’s Commissioner’s School Census” the previous day, and much of what is being proposed by the Local Authority resonates with some of the themes outlined in the report. Carolyn noted that there is a lot of work to do to support schools and expressed the need for clear communication so that everyone involved is working collectively to address the issues and act on the system working together.

Dr Jude Mellor was appreciative of there being more clarity on how the SEND Investment Fund is being utilised. She expressed some concerns over the sustainability of some of the offers. Dr Jude also expressed her concerns around the amount of the fund appointed to staffing, which it appears has not yet been appointed so means that school may not see staff until after October half-term. She noted that the transfer of funding has resulted in tangible staffing cuts in school and now ironically, some of those people will need to be reintroduced into the system, but with a gap of 8 weeks, and the worry is what is going to happen at the end of this academic year with regards to approving further funding. Dr Jude noted that the evaluation of the impact will not be provided until the end of this academic year and when asking for funding for the 2027/2028 academic year, queried how will the fact that we are already behind with implementing the use of the funding this year be accounted for.

Renata acknowledged that she was conscious of the gap with recruitment and that the Authority are working to bring staff in as quickly as possible. The issue around sustainability has been core to the conversations had within the working group when looking at what support is being put in place. The proposed training, and Outreach staff going into schools to help upskill school staff working with children and young people with SEMH needs, is intended to support a more sustainable approach. The awareness that some of what’s on offer has a finite end, particularly in terms of Outreach staffing that will be put in place, is something that is continuing to be considered collectively.

Pete Leatherland noted that the proposals look great but he was unable to clearly see in the paper how they will actually alleviate pressure on the High Needs Block spending, or how it would prevent students from going on to get EHCP’s. He noted there is no evidence of any milestones that are aiming to be reached.

Renata advised that the proposals have been designed to help support mainstream settings to be more inclusive in general for children with SEMH needs and the intention is to try to keep more children within mainstream settings where suitable. The approach is one of prevention, putting strategies in place earlier to help stop needs escalating to a point where they need an EHCP or a move to a specialist provision. We are conscious that some of the strategies are going to take time to bed in, and we might not see the impact of them until towards the end of the academic year, or possibly the following year, so measures for the fund will initially be more focused on what we have been able to deliver. With regards to the lack of milestones with the documents shared with Forum today, more detailed work around the impact will be picked up in the next working group.

Phil Lewin voiced his support for the direction which is being suggested, especially around the Speech and Language aspect, but agreed that it’s difficult to see what the outcomes of all this will be. There is the hope that there will be a resulting reduction of EHCP’s, but there may be pressure for some people to be pushed along the EHCP route as this is currently a way to get more funding for schools that are struggling.

Suzanne Uprichard questioned whether there is consideration being given to the fact that more parents are pushing for their children to have an EHCP in school.

Renata agreed that the Local Authority have seen an increase in the number or requests coming through from parents, and the working group are keen to put additional support in for parents and carers through the SEND Investment Fund. For example, they are looking at possibly providing training and education sessions for parents wo help with understanding their children’s needs and strategies to manage them. However, the funding for this would be relatively limited so is being looked at in the wider terms of the Local Authorities education services to see what other support can be offered locally.

Martin Towers questioned whether the money being used for recruitment was for recruiting permanent or temporary roles, and if temporary, is that why not all roles have been filled yet.

Renata advised that roles being recruited for are a combination of temporary and permanent. A new role which is currently being recruited for the first time is for temporary Assistant Educational Psychologists, and there has been significantly more applications than expected, so applicants are not being put off by the temporary nature of the roles we are recruiting for.

Dr Jude Mellor questioned whether people who are appointed to start after the October half term, will their post run to the next October half term and what impact would that have on the funds allocated.

Tim Browne advised that the money used to create the fund will essentially form part of the high needs block, so the money will be drawn down from that in order to make sure that the full value of the fund is realised throughout the 12 month period, some of the spend will start straight away and some will be lagged. There are added complications due to academies having a different financial year to maintained schools/the Local Authority, so the accountancy flexibility needs to be adopted to ensure the school system is getting full value from the fund and the right level of support.

Beth Clements offered some further reassurance regarding the impact of these new proposals and trying to implement a model of the right support at the right time and place through the fund. In terms of recruitment, some of the positions can be filled utilising existing Local Authority staff who work part time and have flexibility to offer temporary part time provision to schools. The hope is that we will be able to produce some really effective results and come back together to look at the benefits and possible future changes.

The LA made the following recommendation:

2. That Schools' Forum is asked to note the offers to be funded for the 2025/26 academic year and the approach to measure the impact of the fund.

There were no further questions or comments from members on this report.

7 Any other business

Tim Browne addressed the forum regarding the appointment of David Warwick's membership. He was unanimously nominated so Tim formally ratified his membership.

8 Date of next meeting

The next meeting is due to take place on Thursday 6th November

9 Actions

No further actions.

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Leicestershire County Council

SCHOOLS FORUM

PROPOSAL TO EXTEND THE SEN INVESTMENT FUND FOR 2026-27

6 NOVEMBER 2025

Content applicable to:		**School Phase:**	
Maintained Primary and Secondary Schools	**X**	Pre School	
Academies	**X**	Foundation Stage	**X**
PVI Settings		Primary	**X**
Special Schools / Academies		Secondary	**X**
Local Authority	**X**	Post 16	
		High Needs	**X**

Purpose of the report

Content requires:		**By:**	
Noting	**X**	Maintained Primary School Members	**X**
Decision	**X**	Maintained Secondary School Members	**X**
		Maintained Special School Members	
		Academy Members	**X**
		All Schools Forum	

1. The purpose of this report is to update the Schools Forum on the outcome of the consultation on a proposed 0.5% transfer from the Schools Block to the High Needs Block for 2026/27 for the purpose of continuing the SEN Investment Fund.

2. The paper proposes two options for discussion with the Schools Forum around next steps based on consultation feedback and the wider context of heightened pressure on High Needs Block budgets and increased need for outreach support at pupil level.

Recommendations

3. It is recommended that Schools Forum:

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a. Note the responses to the consultation on a further 0.5% transfer from the Schools Block to the High Needs Block of the Dedicated Schools Grant (DSG) for the 2026/27 financial year.

b. Consider the two options set out in paragraphs 24-37 for funding a sustainable outreach and graduated support offer to mainstream schools through Oakfield School. Options include:

- A 0.5% Schools Block Transfer to the High Needs Block, or
- A per-pupil contribution from schools and a commitment from schools to supporting ongoing mainstream inclusion.

c. Agree which option the Forum recommend to Cabinet.

Background

4. Schools Forum received reports on 18th June, 17th September and 4th November 2024, setting out the Authority's proposal to seek a 0.5% transfer of funding from the Schools Block to the High Needs Block of the Dedicated Schools Grant for 2025/26, and reported the findings of a consultation with schools. On 22nd November 2024, the Cabinet agreed that the Council could seek the approval of the Secretary of State on the proposed transfer for 2025/26. The subsequent School Block Transfer approval and establishment of a SEN Investment Fund was reported to the Schools Forum on 12th February 2025.

5. Schools Forum received an update on progress in relation to the development of the SEN Investment Fund offers for 2025/26 at the meeting held on 10th June 2025. At the same meeting, the Schools Forum received a separate report setting out the Local Authority's intention to seek a further School Block transfer for 2026/27.

6. Schools Forum has previously been made aware of the High Needs overspend and Dedicated School Grant deficit position including drivers, mitigations and impact. A report to the Children & Families Overview & Scrutiny Committee on 2nd September 2025 and a subsequent report to Cabinet on 12th September noted that demand pressure on the High Needs Block continues to increase, leading to a significantly worsening overspend position. As at the end of July, there was a net in-year overspend of £41.8m projected on the Dedicated Schools Grant for 2025/26. This comprises an overspend of £45m on the High Needs Block, offset by an underspend of £3.2m on the Early Years Block.

7. The High Needs Block projected overspend for 25/26 is circa £30m more than the budgeted £15m overspend. This is largely due to increased demand on the placement budget. At the end of 2024/25, the accumulated High Needs deficit stood at £64.4m and is now projected to rise to £110.5m at the end of 2025/26. A range of future demand scenarios are being considered in forecasting the High Needs

budget for future years however any level of growth above the funding settlement will increase the cumulative DSG deficit.

8. The number of requests for Education, Health and Care Needs Assessments (EHCNA) in Leicestershire increased 12% in 2024, in line with a similar increase in requests nationally (11.7%). Leicestershire has experienced an additional 25% increase in the number of EHCNAs received between January and September 2025, with the 12 month rolling average annual number of requests reaching over 2,000 at the end of September 2025. The total number of active EHCPs in Leicestershire has also increased over 15% between January and September 2025, to 8,311 at the end of September. It is anticipated demand for funded EHCP packages will reach 8,500 by March 2026. This is 3 years earlier than the previous MTFS forecasted projection.

9. At the Schools Forum meeting on 9th September 2025, the Forum received an update on the confirmed SEN Investment Fund offers for 2025/26, developed in consultation with schools, which would be launched for mainstream educational settings in the Autumn term. The majority of the 2025/26 SEN Investment Fund will be used to expand the existing Primary outreach offer from Oakfield School and create a new multidisciplinary Secondary outreach offer coordinated through Oakfield Secondary, with additional funding for SEMH training for school staff and in-school alternative provision offers.

10. Outreach offers funded through the SEN Investment Fund will initially be introduced temporarily due to the temporary nature of the Fund itself. However, it is noted that there is a need for ongoing targeted support for children and young people with SEND in mainstream schools at risk of permanent exclusion through outreach and a graduated model of support for pupils with additional needs. Demand for support from Primary schools currently outstrips permanent capacity, and it is anticipated that demand for Secondary support will be strong when this offer is introduced in January 2026. It is proposed that any transfer 2026/27 will be focused solely on funding Oakfield outreach and graduated support.

11. Schools Forum also considered at the 9th September meeting a separate report setting out a proposal to consult mainstream schools on a 0.5% Schools Block transfer for 2026/27. The Forum agreed to proceed with formal consultation.

12. A 4-week consultation was undertaken during September and October 2025 through an online survey issued to all mainstream maintained schools and academies, supported by direct written submissions from headteachers, trust leaders, and senior education professionals. The consultation sought views from schools, academies, and education leaders across Leicestershire on the continuation of the 0.5% transfer, the strategic focus of the SEN Investment Fund, and the preferred arrangements for delivery, monitoring, and governance.

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Consultation Outcome

13. The consultation generated a total of 35 responses. A quality assurance review was undertaken to ensure analytical validity and to identify duplicate responses from the same school or organisation. In line with standard consultation methodology, only one response was retained per individual school. However, submissions from different schools within the same Multi-Academy Trust were each counted independently to reflect their distinct budgets and governance responsibilities. Following this review, 31 valid responses were included in the analysis. This ensured that each school was represented once, maintaining fairness and proportionality across the dataset.

14. The respondent group was dominated by secondary academies (approximately 77%), with smaller representation from primary academies, schools with resource bases, and other educational organisations. Around two-thirds (69%) confirmed that their response represented the official position of their school or MAT.

15. The overall response rate was broadly consistent with previous Schools Forum consultations, however, represents a small proportion of the 276 mainstream Primary and Secondary schools across the County.

16. Analysis of the quantitative data demonstrates a clear majority opposition to the continuation of the 0.5% transfer.

    - 71% of respondents strongly disagreed with the continuation of the SEND Investment Fund.
    - 14% tended to disagree.
    - 6% neither agreed nor disagreed.
    - 9% tended to or strongly agreed.

17. When asked whether Social, Emotional and Mental Health (SEMH) should remain the Fund's principal focus:
    - 31% disagreed or strongly disagreed.
    - 40% strongly agreed or tended to agree.
    - 29% expressed neutrality or uncertainty.

18. On the proposal to make the 0.5% transfer annual, the level of disagreement increased further:
    - 89% strongly disagreed.
    - 9% tended to agree.
    - 3% neither agreed nor disagreed.

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19. The overall findings highlight a consistent and significant level of concern across the school system, with respondents questioning both the financial rationale for the transfer and the effectiveness of the Fund's current implementation.

Key Themes within Consultation responses

20. The key themes within the consultation and the local authority response are set out below:

Theme	Local Authority response
Lack of Demonstrable Impact from the Existing Fund The most prominent concern was the absence of clear, publicly available evidence demonstrating the impact of the SEND Investment Fund introduced in 2025/26. Schools consistently reported that, while a portion of their funding had been redirected, they had not observed any tangible improvements in pupil outcomes, access to support, or specialist input. Several respondents expressed frustration that schools were being asked to continue funding an initiative whose benefits remained unproven.	The Local Authority acknowledges that the first 6 months of the Fund's implementation was primarily focused on co-producing the 2025/26 offers with school representatives, commissioning, and establishing delivery infrastructure including recruitment, which has inevitably delayed implementation and therefore measurable impact. A formal outcomes framework has now been established, linking performance to attendance, exclusions, and EHCNA reductions. An initial evaluation report will be presented to Schools Forum in Spring 2026, with subsequent regular updates thereafter. It has been noted to the School Forum previously that the impact of the Fund on reducing systemic demand pressures will take some time to be realised.
Impact on Frontline Provision and Staffing Many schools described how the funding transfer had limited their capacity to sustain frontline provision, particularly Learning Support Assistants (LSAs) and other classroom-based staff supporting pupils with additional needs. Several leaders noted that this reduction undermines inclusion and contradicts the stated objectives of	The Local Authority recognises the financial pressures faced by schools. It emphasises the transfer represents a limitation on annual funding growth, rather than a reduction in core budgets. The purpose of the Fund is to invest in system-wide strategies and support that improve sustainability, building collective capacity and reducing overreliance on one-to-one adult support. The Authority is working with schools to ensure that future investments are demonstrably visible and beneficial at school level.

improving outcomes for pupils with SEND.	
Transparency, Governance, Communication and Accountability A strong theme throughout the consultation was the perceived lack of transparency regarding how funds were distributed, governed, and evaluated. Respondents expressed concern about limited engagement and perceived lack of co-production in developing the proposals. Many schools highlighted that previous attempts at collaboration had not led to meaningful dialogue or shared decision making. Schools called for the publication of detailed financial information, clear governance structures, and outcome-based reporting. Respondents requested that schools be represented in decision-making processes to ensure accountability.	The Local Authority has overseen a working group of school representatives who have shaped and agreed the offers for 2025/26 and has actively encouraged further membership of the group along with providing regular progress updates to a range of forums. The working group also attempted to engage widely with schools through surveys publicised through Headteacher Briefings. However further improvements in communication and transparency will be introduced to ensure more ownership of decision-making going forward. Performance data will be presented to Schools Forum on a termly basis.
Focus of the Fund – SEMH and Wider Needs While the majority of respondents acknowledged the increasing prevalence of SEMH needs, many felt that an exclusive focus on SEMH risked neglecting other areas such as cognition and learning, communication and interaction, and sensory or physical needs. Several schools argued that a broader, more flexible approach would ensure equitable access to support.	The Local Authority agrees that any future iterations of the Fund should respond to a wider spectrum of SEND. SEMH will remain the lead priority for 2026–27 due to its prevalence in the local EHCP population (currently 23%) and influence on attendance and exclusions, but new workstreams focusing on cognition and learning and communication and interaction will be developed during the year in collaboration with schools.
Equity of funding contributions and the Impact on Inclusive Schools A recurring concern was that schools with higher proportions of pupils with SEND contribute proportionately more	Under the National Funding Formula (NFF), the Minimum Per Pupil Funding Level (MPPL) and Minimum Funding Guarantee (MFG) continue to safeguard core budgets. Nonetheless, the Local

to the transfer and therefore experience a greater financial impact. Respondents described this as counterintuitive and inequitable, suggesting that it risks discouraging inclusive practice.	Authority recognises that perceptions of inequity can undermine confidence. An alternative proposal for continuation of funding for outreach and support using a different method for establishing funding contributions is set out in paragraphs 43-46 below.
Monitoring, Evaluation and Equalities Compliance Respondents asked for assurance that appropriate equality impact assessments had been completed and requested that outcomes be monitored against clear, measurable objectives.	A full Public Sector Equality Duty (PSED) Impact Assessment will accompany this proposal. Monitoring and evaluation processes will be embedded from the outset, with progress reviewed annually and reported to Schools Forum. Performance indicators will focus on inclusion, attendance, and educational progress for pupils with SEN.

<u>Ongoing need for a SEN Investment Fund</u>

21. The feedback from the consultation demonstrated an opposition to undertaking the schools block transfer and the continuation of the SEN Investment Fund for 2026/27. Whilst this feedback was clear, demand for support for children and young people with SEND in Leicestershire is growing at a faster rate than was anticipated against the Medium-Term Financial Strategy, leading to an increasingly unsustainable financial position for the entire education system.

22. There is a need for ongoing support for inclusion and belonging of children and young people with SEND in mainstream schools, and clear demand for outreach and graduated support for pupils with additional needs following the ending of existing offers funded through the SEN Investment Fund. Mainstream inclusion is anticipated to be a clear expectation from the Schools White paper.

23. This therefore leaves the Local Authority and school leaders with some difficult decisions over how to support children with additional needs going forward.

<u>Options</u>

Option 1 – Continue with School Block Transfer to create ongoing SEN Investment Fund

24. The School Block Transfer for 2026/27 would be used to fund a sustainable outreach and graduated support offer accessed via Oakfield for mainstream Primary and Secondary Schools.

25. The multidisciplinary outreach model introduced during 2025/26 from the existing SEN Investment Fund will offer in-reach support for schools accessed via Oakfield School that upskills staff working with children with additional needs and provides direct intervention with a child and their family. Staff will go into schools to support teachers and support staff through observations, modelling and solution circles, as well as delivering direct interventions. It is proposed that this will continue on a sustained basis through the future SEN Investment Fund.

26. In addition, the Fund will also deliver an offer of bespoke in-school intensive support for children and young people outside of their classroom through Oakfield. This would be co-produced with schools. It would take place at the times triggers are observed. The provision would seek to help children and young people regulate their emotions but would also have an academic focus to ensure they are able to reach their full potential. There may be an additional focus in the sessions to address specific identified needs.

27. The offer will support parents to fully understand what support mainstream schools can be expected to provide. They would also present parents with data around the attainment and progress of children and young people placed in specialist provision compared with those who remain at a mainstream school.

28. As a key area of ongoing concern, support for EBSNA will be considered as part of the graduated support and outreach offer. EBSNA consultations introduced through the SEN investment fund for 2025/26 may look to be continued subject to feedback from schools on their effectiveness.

29. The SEN Investment Fund and onward plan will deliver:

- Increased direct support to schools
- Increased access to specialists
- High quality educational curriculums for pupils at risk of exclusion or those permanently excluded that provide pupils with meaningful outcomes through Oakfield School
- An opportunity to support pupils to maintain their place in their mainstream school through targeted intervention
- Reduced mobility of pupils within the system
- Improved targeted support through access to high-quality training

30. To provide ongoing rigor and accountability, it is recommended that we establish a Steering Group of school leaders to determine the governance arrangements and impact reporting mechanism.

31. Within the nationally set financial framework for school funding, the only option of removing funding from the Schools Block to High Needs is by capping per pupil

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funding gains between years. Given that per pupil funding is protected at a level only slightly above the Age Weighted Pupil Unit (AWPU) as the only universal funding received by all pupils, funding gains are delivered within the NFF additional factors which are largely related to deprivation measures.

32. Taking into account feedback from the consultation around equity of funding contributions, the final methodology for determining contributions will be confirmed when funding allocations have been announced by the DFE.

Option 2 – Continue Oakfield outreach and graduated support offer funded by a per-pupil contribution from schools and commitment to supporting ongoing mainstream inclusion

33. Considering opposition to continuation of the transfer, an alternative proposal for funding a sustainable model for outreach and graduated support for pupils with additional needs in mainstream schools via Oakfield School is proposed for consideration by the Schools Forum.

34. This option would see schools make an annual per-pupil contribution based on the number of children on roll. Mainstream schools would also be asked to commit to supporting ongoing mainstream inclusion and support measures to create a more sustainable financial position for the Leicestershire educational system by:

    - Reducing new EHCP requests in proportion to their individual historical request level through the development of mainstream inclusion offers
    - Reducing permanent exclusions, using managed moves/alternative provision
    - Accepting an agreed number of pupils with SEND rather than LCC placing in specialist provision
    - Develop inclusion provision/spaces

35. An indicative per pupil contribution level would need to be agreed based on creating a sustainable outreach and graduated support model across the Primary and Secondary mainstream education system for Leicestershire.

36. A number of responses to the Schools Block Transfer consultation refer to schools with higher numbers of SEND pupils being impacted by the proposals and the disproportionate impact of the transfer across Leicestershire Schools. A per-pupil contribution model would address these concerns by introducing a standard contribution, ensuring equity across all mainstream schools.

37. In following this approach, consideration would need to be given to proportionate access to support offers to ensure that mainstream inclusion and belonging remains a priority for all schools. The Leicestershire education system would need to work in partnership to create a more sustainable system, with expectations that the current unprecedented level of demands upon the High Needs Block are reduced, including

reductions in the number of pupils permanently excluded from schools, particularly those with a disproportionately high number.

Next Steps

38. A report will be taken to Cabinet on 18th November 2025 to consider the options for funding the sustainable outreach and graduated response model from Oakfield School outlined within this paper. The recommendation from the School Forum will be included.

39. Should Cabinet make a decision to continue with the School Block Transfer without the agreement of the Schools Forum, a request for a decision from the Secretary of State will need to be submitted by mid-November 2025. Confirmation of the decision from the Secretary of State would be expected prior to the next Schools Forum meeting in February 2026.

Financial implications

40. Whilst the Government's Schools White Paper is expected to result in systemic changes to the national SEND system, such changes will take several years to deliver, and none appear to directly address the current or forecast funding issues. Any announcements linked to SEND reform are now not expected until the New Year.

41. The 0.5% transfer proposed from the Schools Block to the High Needs Block is expected to generate around £2.8m for 2026/27, to be confirmed when budget allocations are received from the DfE.

42. The impact of any block transfer on individual schools will be confirmed following budget allocations being received from the DfE.

43. Should a per-pupil charge be agreed, this would also be confirmed to schools following receipt of budget allocations from the DfE and using the number of pupils on roll on the annual school census day.

Equality Implications

44. The SEN Investment Fund by its nature is targeted at children and young people with SEMH needs, however will support wider inclusive mainstream practice which should benefit all children and young people. A full Equality Impact Assessment will accompany this proposal.

45. A number of comments throughout the consultation responses refer to schools with a higher number of SEND pupils being impacted disproportionately by the proposals. Within the nationally set financial framework for school funding, the only

option of removing funding from the Schools Block to High Needs is by capping per pupil funding gains between years. Given that per pupil funding is protected at a level only slightly above the Age Weighted Pupil Unit (AWPU) as the only universal funding received by all pupils, funding gains are delivered within the NFF additional factors which are largely related to deprivation measures. Methodology for the 2026/27 transfer will be confirmed following confirmation of budget allocations by the DfE.

46. The alternative per-pupil funding model proposed would result in a proportionate impact across Leicestershire schools from a contribution perspective, however due to differing pupil demographics and levels of SEND in schools, the resulting need for support from the fund may not be the same across all schools.

Background papers

Report to the Cabinet on 12 September 2025, “Medium Term Financial Strategy – Budget Monitoring and MTFS Refresh”, https://democracy.leics.gov.uk/documents/s191577/MTFS%20Sept%2025%20Cabinet%20-%20030925%204pm%20FINAL.pdf

Report to the Schools Forum on 9 September 2025, “2026/27 Schools' Block Transfer” , https://democracy.leics.gov.uk/documents/s191584/School%20Block%20Transfer%20Report%2009092025.pdf

Report to the Schools Forum on 9 September 2025, “SEN Investment Fund”, https://democracy.leics.gov.uk/documents/s191586/Schools%20Forum%20report%20-%20SEN%20Investment%20Fund%202025-26.pdf

Report to the Children & Families Overview & Scrutiny Committee on 2 September 2025, “Transforming SEND and Inclusion in Leicestershire (TSIL) Programme Summary and High Needs Block Update”, https://democracy.leics.gov.uk/documents/s191237/Transforming%20SEND%20and%20Inclusion%20in%20Leicestershire%20TSIL%20Programme%20Summary%20and%20High%20Needs%20Block%20Upda.pdf

Report to the Schools Forum on 10 June 2025, “2026/27 Schools’ Block Transfer” https://democracy.leics.gov.uk/documents/s190104/2026-27%20Schools%20Block%20Transfer.pdf

Report to the Schools Forum on 10 June 2025, “SEN Investment Fund Update” https://democracy.leics.gov.uk/documents/s190092/SEN%20investment%20fund.pdf

Report to the Schools Forum on 12 February 2025, “2025-26 Schools Budget”, https://democracy.leics.gov.uk/documents/s188368/5.%202025-26%20Schools%20BudgetV3.pdf

Report to the Cabinet on 22 November 2024, “Proposed Transfer of Funding From The Schools Block to The High Needs Block of The Dedicated Schools Grant”
https://democracy.leics.gov.uk/documents/s186577/Resetting%20SEND%20Finance%20 Cabinet%20report.pdf

Report to the Schools Forum on 4 November 2024, “Resetting the SEN Finance System”
https://democracy.leics.gov.uk/ieListDocuments.aspx?CId=1018&MId=7978&Ver=4

Report to the Schools Forum on 17 September 2024, “SEN Investment Fund and Schools Block Transfer”
https://democracy.leics.gov.uk/ieListDocuments.aspx?CId=1018&MId=7957&Ver=4

Report to the Schools Forum on 18 June 2024, “Resetting the SEN Finance system”
https://democracy.leics.gov.uk/ieListDocuments.aspx?CId=1018&MId=7734&Ver=4

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Leicestershire County Council

SCHOOLS FORUM

Exceptional Premises Factor – Disapplication Request

6 NOVEMBER 2025

Content applicable to:		**School Phase:**	
Maintained Primary and Secondary Schools	**X**	Pre School	
Academies	**X**	Foundation Stage	**X**
PVI Settings		Primary	**X**
Special Schools / Academies		Secondary	**X**
Local Authority	**X**	Post 16	
		High Needs	**X**

Purpose of the report

Content requires:		**By:**	
Noting	**X**	Maintained Primary School Members	**X**
Decision	**X**	Maintained Secondary School Members	**X**
		Maintained Special School Members	
		Academy Members	**X**
		All Schools Forum	

Purpose of the Report

1.The purpose of this report is to seek Schools Forum approval for the continued application of the exceptional premises factor within the 2026-27 Leicestershire school funding formula and to secure Schools Forum support for the associated disapplication request required by the Department for Education (DfE).

2.This disapplication request is required to maintain financial support for unavoidable rental costs incurred by a small number of schools where those costs are essential for curriculum delivery but are not recognised within the national factors of the National Funding Formula (NFF).

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Recommendations

3.It is recommended that Schools Forum approves the continuation of the exceptional premises factor for 2026-27.

4.It is further recommended that Schools Forum endorses the submission of a disapplication request to the DfE to allow this factor to remain operational within the local formula.

Background

5.Under the structure of the NFF, local authorities are only permitted to include premises funding within the local formula where it falls under the nationally defined factor set, such as PFI or split-site funding.

6.A small number of schools in Leicestershire incur rental costs for essential buildings or sports facilities, due to estate limitations, planning restrictions or the absence of suitable on-site provision.

7.These rental commitments have historically been accepted by the DfE as legitimate exceptional premises costs and funding has been included in the Leicestershire formula over a number of years with DfE approval.

8.The continuation of this exceptional factor ensures that the impact of these unavoidable site constraints is not unfairly borne by the individual schools affected.

Detail

9.The Local Authority proposes to maintain this funding for seven eligible schools in 2026-27 where formal lease or licence agreements exist.

10.The Local Authority reviews all rental agreements annually to confirm that costs remain essential, unavoidable and directly linked to delivery of the statutory curriculum.

11.Without this support, schools would be required to absorb a level of cost that would lead to reductions in staffing or curriculum provision that are not required in other schools.

12.The Local Authority is satisfied that these arrangements remain exceptional, essential and that no alternative mechanism exists to fairly reflect these costs within the NFF.

Financial Implications

13.For 2025/26 the total cost of the exceptional premises factor was £82,670, supporting seven schools.

14.This funding will continue to be met from within the Schools Block.

15.The scale of this cost remains immaterial in the context of the overall Schools Block but material to the financial viability of the schools in receipt, particularly those with smaller pupil populations.

16.As this represents a continuation of existing approved funding, there is no affordability impact on other schools.

Policy and Regulatory Compliance

17.The exceptional premises factor meets the DfE requirement that such funding applies only to a very small number of schools and reflects costs essential to statutory curriculum delivery.

18.The Local Authority has maintained a consistent methodology and evidence base for eligibility year-on-year.

19.DfE approval continues to be required via disapplication because this factor sits outside the core NFF structure, and Schools Forum support must be confirmed before such approval can be granted.

Conclusion

20.The continuation of the exceptional premises factor promotes fairness within the NFF by ensuring estate constraints do not lead to disproportionate financial consequences for a small number of schools.

21.Schools Forum support is a necessary step to secure DfE approval for this factor to remain in the local formula for 2026-27.

<u>Background papers</u>

Report to the Cabinet on 12 September 2025, “Medium Term Financial Strategy – Budget Monitoring and MTFS Refresh”, https://democracy.leics.gov.uk/documents/s191577/MTFS%20Sept%2025%20Cabinet%20-%20030925%204pm%20FINAL.pdf

Report to the Schools Forum on 9 September 2025, “2026/27 Schools' Block Transfer” , https://democracy.leics.gov.uk/documents/s191584/School%20Block%20Transfer%20Report%2009092025.pdf

Report to the Schools Forum on 10 June 2025, “2026/27 Schools’ Block Transfer”
https://democracy.leics.gov.uk/documents/s190104/2026-27%20Schools%20Block%20Transfer.pdf

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Report to the Schools Forum on 4 November 2024, “Resetting the SEN Finance System”
https://democracy.leics.gov.uk/ieListDocuments.aspx?CId=1018&MId=7978&Ver=4

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