

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 of 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. 2026/27 Schools' Block Transfer (report is attached)

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 EHCP Funding Transition (report is attached)

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 SEND Investment Fund (report is attached)

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 and Outreach Support – The Oakfield Outreach offer will also be available for Secondary schools as this has been identified as a particular gap. There will 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 of 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 to 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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