

Minutes of the meeting of Herefordshire Schools Forum held at virtual meeting platform on Friday 20 March 2026 at 9.30 am

Present: **Mr P Jennings (Academies) (Chairperson)**

K Andrews	Academies
Z Beecham	Academies (Primary)
B Blower	PRU - Management Committee
A Breakwell	Maintained Primary - headteacher
A Davies	Academies (primary)
S Debenham	Maintained Primary - headteacher
P Deneen	Trade Unions
N Gilbert	LA Special Schools
C Lewandowski	Trade Unions
R Lloyd	Early Years Providers

In attendance:

Officers: **Democratic Services Officer, Finance Business Partner for Education and Schools, Head of Strategic Finance , Interim Finance Business Partner, Senior Finance Business Partner, Service Manager Additional Needs**

22. APOLOGIES FOR ABSENCE

Apologies received from members: Hayley Manns, Gemma Martin, Richard Foster and Dave Williams.

Apologies received from Officers: Hilary Jones - Head of Additional Needs, Louise Tanner - Head of Learning and Achievement and Liz Farr - Service Director, Education, Skills and Learning.

23. NAMED SUBSTITUTES (IF ANY)

There were no named substitutes.

24. DECLARATIONS OF INTEREST

There were no declarations of interests.

25. MINUTES

RESOLVED: That the minutes of the meeting held on 20 January 2026 were approved as an accurate record.

The chair informed the forum he was using his discretion to bring forward the Deficit management plan to be the first substantive item on the agenda.

26. DSG DEFICIT MANAGEMENT PLAN AND SEND REFORMS

The Service Manager Additional Needs (SMAN) informed the forum that the deficit management plan comprised four principal workstreams, primarily centred on intervention, inclusion support for schools, and increasing local sufficiency of complex places and resource-based provision.

Update on Intervention and Inclusion Work included;

- **Harvest Project:** Enrolments had increased, and recent impact reporting from schools demonstrated clear benefits for pupils.
- **Commissioned Places:** Short- and long-term commissioned SEMH places are being developed, with some new provision expected to open in the next academic year.
- **Inclusion Outreach Service:** Demand continued to rise, with referrals increasing. The service had expanded beyond SEMH to cover additional primary needs and is triaging support effectively. Advisory visits and crisis support remained a key feature, with intervention specialists deployed into schools to work alongside staff and pupils.
- **Key Stage 3 and Me Workshops:** Following co-production with young people, the redesigned programme is now successful and meeting needs more effectively.
- **Inclusive Classroom Projects:** These initiatives were running well and providing wider support across schools.
- **Parent Workshops:** In response to demand, new workshops had been created to help parents understand school-based strategies. The pilot at St Paul's School received very positive feedback, and sessions will be offered more widely via the School Effectiveness Team.
- **Support Staff Surgeries:** A new model had been introduced whereby advisory teachers and intervention specialists spend a full day in schools, using a carousel format to address practice-based concerns and deliver structured activities for pupils. This is intended to strengthen inclusion expertise among support staff.

Updates on Sufficiency and Capital Projects included;

- The DfE confirmed that free school proposals for Herefordshire would not proceed. A formal response was submitted by the deadline, and initial feedback described it as well-crafted, with further steps expected in due course.
- **Hampton Dene Expansion:** Work continued at pace, with the new provision scheduled to open in September 2026.
- Increased sufficiency locally would reduce out-of-area placements, although additional places naturally result in increased expenditure within the High Needs Block. The moral imperative to provide appropriate local provision for complex pupils remained central.
- **Westfield Rebuilding Programme:** A project team had been appointed and a DfE feasibility study is expected over the next 6–12 months.
- **Rye Field Centre:** Herefordshire's first MLD specialist provision is progressing despite some building delays.
- Additional developments included; new autism bases, the SCMH resource space at Trinity, expansion of HPRS places and advancement of the AP pathway.
- Capital funding for AP and HPRS development had been secured through cabinet approval, enabling refurbishment of existing sites as a cost-effective approach.

Significant contributions of finance colleagues and service teams was acknowledged, noting that the combined work had helped contain the growth of the deficit, which would have been substantially higher had no action been taken.

White Paper Overview

The Service Manager Additional Needs provided an overview of the newly published Schools White Paper and the accompanying SEND Reform Plan. The documents set out the Government's long-term education reform agenda, focusing on raising standards and strengthening inclusion.

Key national challenges identified included attainment gaps, disadvantage, SEND system pressures, and declining attendance. National targets were outlined, including an average GCSE grade 5 or above, halving the disadvantage gap, improving attendance, and strengthening pupils' sense of belonging. Delivery of these ambitions was noted to rely on a well-supported workforce. Workforce reforms include enhanced teacher recruitment and retention measures, improved maternity pay, and incentives for headteachers in high-needs areas.

The SEND reform proposals emphasised early intervention, improved mainstream provision, the introduction of an Inclusive Mainstream Fund, and the Experts at Hand multi-agency model.

A new national Inclusion Standard would be introduced, requiring schools to publish an Inclusion Strategy.

Significant proposed changes to Education, Health and Care Plans (EHCP) were highlighted being restricted to the most complex needs, with Individual Support Plans introduced for all other pupils requiring support. New specialist provision packages would underpin EHCPs. These changes were expected from 2029, with existing statutory duties remaining unchanged until then.

A national consultation on the White Paper and SEND reforms is open until May, and all stakeholders were encouraged to contribute.

In response to the forum questions, it was noted;

1. The lack of detailed information regarding, local funding allocations, the structure of the proposed "experts at hand model" and the operational and financial implications for rural areas had been raised multiple times with the Department for Education.
2. The authority is continuing to actively feedback the need for greater clarity and rural consideration within the reforms.
3. Detailed information on academisation was not yet available. The Service Director was due to meet with the DfE to seek clarification, and a written update would be circulated to the committee.
4. The government's policy regarding elective home education continued to change and no firm detail had been issued about registration requirements or associated funding. Further clarification would be sought. A written update and the figures of electively home-educated children in Herefordshire, including associated funding would be circulated with the item added as a standing item on the Budget Working Group agenda.

Feedback from the Budget Working Group included the potential implications of the reforms, particularly the re-emergence of proposals for groups of schools working together. Questions had been raised about the scale of consultation planned for the summer term and the financial vulnerability of some single-academy trusts.

Support was expressed for the Service Director, Education, Skills and Learning and her team on SEND reforms, recognising the substantial effort and positive direction of travel and acknowledging the difficult financial decisions having to be made and the team's frustrations arising from the DfE's repeatedly changing decisions.

Actions:

1. Detailed information on academisation once sought from the DfE to be circulated to the forum.
2. Specific data on current sufficiency in terms of the residential/non-residential split to be circulated.
3. A written update on the figures of electively home-educated children in Herefordshire, including registration requirements and associated funding to be circulated with the item added as a standing item on the Budget Working Group agenda.

27. RECOUPMENT FROM SCHOOLS BUDGETS FOR PERMANENT EXCLUSIONS AND HOSPITAL EDUCATION

The Interim Finance Business Partner introduced the revised process for recouping school budget shares for Permanently excluded pupils and Pupils educated elsewhere (mainly hospital), the following principal points were noted.

- Currently the Herefordshire Pupil Referral Service (HPRS) liaised directly with schools and invoice the school directly, taking those funds into their provision to offset their costs and the Local Authority (LA) adjusted the SLA accordingly to consider the extra income that was being brought in.
- The new approach would bring Herefordshire's process in line with the Department for Education (DfE) guidance, which states that local authorities, not PRUs/HPRS, should recoup funding from schools.
- The LA would now invoice schools direct for pupils who are permanently excluded, or receiving hospital education and the income would go into the High Needs Block to offset alternative provision costs.
- HPRS would now be funded solely through place and top-up funding (similar to special schools) and would no longer receive direct income from schools. SLAs would reflect this.
- How the charges to Schools would be calculated was explained with the value rates for 2025–26 being included at Appendix 1.

The forum was in support of the revised process implemented from September 2025 and emphasised the importance of supporting children in hospital schools. It was noted that the new process was fairer, simpler, and significantly more beneficial for the PRU, as it placed responsibility with the local authority rather than individual schools.

28. DEDICATED SCHOOLS GRANT 2025/26 QUARTER 3 OUTTURN

The Head of Strategic Finance (HSF) introduced the report, the following principal points were noted.

- The latest forecast end-of-year position indicated an overspend of £18.2 million. (improved from the originally budgeted £20m deficit).
- Underspends were largely related to independent school fees and complex needs costs, partially offset by increased top-up payments (mainstream, special schools, PRUs, and post-16).
- The high needs block continued to experience significant pressure and at 31 March 2026 the forecasted outturn would mean a cumulative DSG deficit balance of £38.2 million.
- With the DfE's recent announcement of the High Needs Stability Grant (HNSG) to offset 90% of LA historic DSG deficits up to and including the 31 March 2026, the Council would still have to fund the remaining 10% (approx. £4m) from the general fund reserves, which were already under pressure.

- Work was ongoing to develop and implement the SEN reform plan, which was required to be submitted to the DfE for approval to receive the grant funding.
- Despite the welcome funding, significant concerns remain due to the ongoing growth in high needs demand over the next two years, shrinking local authority reserves and uncertainty about future funding approaches after the statutory override ends in March 2028.

In response to forum questions, it was noted that;

1. The reduction of independent school costs was due to the council's ongoing work to expand local sufficiency of specialist places, which forms an important part of wider SEND reforms and financial planning.
2. It was explained that the current sufficiency was largely non-residential. The specific data on the residential/non-residential split was not included in the slides but could be provided.
3. Details for future years had not yet been provided by the government, but it was confirmed that only the high needs block deficit would be covered. It was noted that any surplus reserves from other blocks, excluding school balances, were expected to be used to offset the deficit, meaning current arrangements would continue.

The service was praised for the lower-than-expected costs of independent schools and the work being conducted to reduce costs whilst ensuring support for young people who do not require independent school placements.

It was queried whether parents, unable to secure places in maintained special schools, might be choosing elective home education instead of independent specialist provision, and whether this trend affected funding allocations.

The forum heard how the budget working group had acknowledged and praised the significant work undertaken to reduce pressures in the system but despite the progress made, and they had noted that further challenges remained.

Thanks was offered to the Budget Working Group and Herefordshire Council staff for their thorough and professional work in reviewing the items presented, emphasising their commitment to securing the best outcomes for children and young people in the county, noting whilst funding for special needs appeared to be improving and that greater government responsibility for the budget would help local authorities, future developments remained uncertain and challenges remaining.

29. HIGH NEEDS BUDGET 2026/27

The Head of Strategic Finance (HSF) introduced the report, the following principal points were noted.

- The gross allocation for 2026/27 had increased by £1.9m, but the uplift was insufficient to meet the rapidly growing demand.
- £5.5m funding is recouped from the local authority to directly fund special academies, FE colleges, and other providers.
- Transfers from other DSG blocks had been made to support the High Needs Block:
 - £100k from Early Years (SEN Inclusion Fund)
 - £300k from the Central Block
 - Total transferred: £400k
- After transfers, the High Needs Block allocation totalled £25.1m.

- Budget setting used Q3 data, factoring in inflation, pupil growth, new placements, and known changes, developed in partnership with the SEN team.
- The actual funding requirement to meet identified need is £50.9m, resulting in a proposed in-year deficit of £25.8m.
- This represents a £5.8m increase compared to the 2025–26 in-year deficit of £20m.
- A detailed breakdown of the budget pressures and allocations was provided in the accompanying slide deck.

In response to a forum question It was explained that, although Herefordshire was still experiencing a rising deficit, the council had managed to contain overspend more effectively than many other local authorities. It was noted that several neighbouring and metropolitan councils had faced significant and long-standing deficits. Herefordshire was currently in a comparatively stronger position despite ongoing challenges.

Views from the budget working group had included concerns with the increase in children with ECHPs coming in for September and questions raised over the continued spending that was expected of the local authority without full DfE support, them noting that current funding appeared to cover only around half of what children needed. The BWG recommended the budget as outlined in the report to the Schools Forum.

A member noted that a key driver of the high-needs overspends which was often overlooked, was the extension of EHCP entitlement from age 19 to 25, which was introduced without additional funding. This required councils to support young adults, often in expensive independent settings due to limited local provision, adding six unfunded years of entitlement and making the budget difficult to balance. Colleagues were commended for minimising costs.

Concerns were raised that the rising high-needs deficit could disproportionately impact Herefordshire due to the council's smaller size and more limited reserves. It was questioned whether the F40 group had taken a position and suggested that working collectively with other underfunded authorities could help apply pressure on the government for fairer funding.

The forum unanimously supported the recommendations in the report.

Resolved that the school's forum recommends a High Needs Budget of £50.9 million for 2026/27 for approval by the Cabinet Member for Children and Young People.

30. DATE OF NEXT MEETING

Friday 10 July 2026.

The meeting ended at 10.41 am

Chairperson