

Agenda

Herefordshire Schools Forum

Date: **Friday 21 November 2025**

Time: **9.30 am**

Place: **virtual meeting platform**

Notes: Please note the time, date and venue of the meeting.

For any further information please contact:

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If you would like help to understand this document, or would like it in another format, please call Jenny Preece, Democratic Services Officer on 01432 261699 or e-mail jennypreece@herefordshire.gov.uk in advance of the meeting.

Agenda for the meeting of the Herefordshire Schools Forum

Membership

Chairperson Alison Banner - LA maintained secondary schools
Vice-chairperson Paul Jennings - Academies

Kate Andrews	Academies
Beverley Blower	PRU - Management Committee
Adam Breakwell	Maintained Primary - headteacher
Alex Davies	Academies (primary)
Stewart Debenham	Maintained Primary - headteacher
Paul Deneen	Trade Unions
Richard Foster	Local Authority Maintained Primary School
Nicki Gilbert	LA Special Schools
Andy Gosling	Secondary Governors
Georgie Griffin	Primary Governors
Kate Joiner	Academy Special School
Tim Knapp	Academies
Chris Lewandowski	Trade Unions
Rose Lloyd	Early Years Providers
Hayley Manns	Early Years providers
Gemma Martin	Diocese of Hereford
Clare Perez	16-19 Providers
Rachel Ussher	LA Maintained Primary School (nursery class)

Agenda

		Pages
1.	ELECTION OF CHAIRPERSON To elect a chairperson for the ensuring year.	
2.	ELECTION OF VICE-CHAIRPERSON To elect a vice-chairperson for the ensuing year.	
3.	APOLOGIES FOR ABSENCE To receive apologies for absence.	
4.	NAMED SUBSTITUTES (IF ANY) To receive any details of Members nominated to attend the meeting in place of a Member of the Forum.	
5.	DECLARATIONS OF INTEREST To receive any declarations of interest by Members in respect of items on the Agenda.	
6.	MINUTES To approve and sign the minutes of the meeting held on 11 July 2025.	5 - 10
7.	DEDICATED SCHOOLS GRANT 2025/26 QUARTER 2 OUTTURN To provide an update to the Schools Forum on the Dedicated Schools Grant (DSG) outturn as at 30 September 2025 (Quarter 2).	11 - 16
8.	SCHOOLS NATIONAL FUNDING FORMULA 2026/27 UPDATE To provide an update to the Forum on the Schools National Funding Formula 2026/27, including the recommendations of the Budget Working Group (BWG) on the Herefordshire schools' budget 2026/27.	17 - 22
9.	DSG DEFICIT MANAGEMENT PLAN To report on the progress of delivering the Deficit Management Plan (DMP). (No background papers)	
10.	REQUEST TO THE SECRETARY OF STATE TO DISAPPLY THE SCHOOL FINANCE REGULATIONS To request the continued support of Schools Forum in respect of a Disapplication request to the Secretary of State for Education for exceptional circumstances for Eastnor Primary School's rent of additional classrooms	23 - 26
11.	DE-DELEGATIONS AND EDUCATION MANAGEMENT FUNCTION PROPOSAL 2026/27 To request Schools Forum agree the De-Delegated Services and the Education Management Function for 2026/27.	27 - 32

12. SCHEME FOR FINANCING SCHOOLS (LMS SCHEME)

To update the Forum on changes to the scheme.

(No background papers)

13. DATE OF NEXT MEETING

Friday 23 January 2026.



Minutes of the meeting of Herefordshire Schools Forum held at virtual meeting platform on Friday 11 July 2025 at 9.30 am

Present:	Ms A Banner (LA maintained secondary schools) (Chairperson)	
	Mr P Jennings (Academies) (Vice-chairperson)	
	Mr A Davies	Academies (primary)
	Mr P Deneen	Trade Unions
	Ms N Emmett	Academies
	Mr R Foster	Local Authority Maintained Primary School
	Ms N Gilbert	LA Special Schools
	Ms R Ussher	LA Maintained Primary School

In attendance:

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

23. APOLOGIES FOR ABSENCE

Apologies were received from Beverley Blower, Andy Gosling, Tim Knapp, Chris Lewandowski, Rose Lloyd, Gemma Martin and Clare Perez.

Officers;
Louise Tanner - Head of Learning and Achievement

24. NAMED SUBSTITUTES (IF ANY)

There were no named substitutes.

25. DECLARATIONS OF INTEREST

There were no declarations of interest.

26. MINUTES

Resolved: That the minutes of the meeting held on 14 March 2025 were approved as a correct record.

27. DEDICATED SCHOOLS GRANT 2024/25 OUTTURN, SEN PROTECTION SCHEME, AND DSG DEFICIT MANAGEMENT STRATEGIES

The Senior Finance Business Partner (SFBP) presented the report. The following principal points were noted;

- The final outturn position for 2024/25 was a deficit of £13.9 million made up of;
 - High needs block outturn - £13.7 million higher than funding with the main drivers being £6 million independent schools, £1.9 million top ups and £6 million budget deficit built into 2024/25 budget.
 - Early Years block outturn is £240k higher than funding driven by a late Easter date (20th April 2025) resulting in higher payments; this will offset in 2025/26 funding.

- Central block outturn £35k less than funding driven by favourability in staff in the admissions cost centre (due to vacancy/delay in hiring).

This increased the council's cumulative DSG deficit to £20million at 31 March 2025.

The cumulative DSG deficit is accounted for as an unusable reserve on the council's Balance Sheet, as permitted via statutory instrument, and will remain in place until 31 March 2028 having been extended by two years on 20th June by Government.

Measures to contain the deficit and mitigate future cost and demand pressures will be managed by the Service through the DSG Deficit Management Plan. It was noted that this issue is a major concern amongst local authorities nationally.

SEN Protection Scheme

- The scheme was originally put in place to reward the most inclusive of schools, but this no longer happened. Due to affordability issues in both the schools block and high needs block, compromises were going to have to be made. The scheme would continue for 25/26 with a phased approach to end SEN Protection scheme in 2026/27.
- The Budget working group had been consulted and had recommended a more phased approach for the discontinuation of the SEN Protection scheme with further excel modelling required. This was shared with the forum.
- There would be no transfer from the Schools Block to the High Needs Block in 2026/27 and whilst schools would not get the SEN protection scheme, they would see an increase in their budgets.
- The block transfer process would be reviewed at budget setting in 2027/28.

DSG Management Plan -

The Service Director, Education, Skills and Learning and Head of Additional Needs presented to the forum. The following principal points were noted;

- Herefordshire is feeling acute pressure on their High Needs Budget, despite increases in specialist provision having been commissioned over the past few years. More children and young people were being placed in the independent and non-maintained special schools at high cost.
- The removal of the SEN protection scheme would result in wiser spend on more targeted support which would help all schools at the right time.
- Increase in independent school places were, in part due to the special schools in Herefordshire being over capacity. The provision menu in Herefordshire was too narrow and needed to be expanded, the outdated code of practice which included parental preference is driving pressures in local authorities.
- Greatest growth areas in Herefordshire are primary needs in ASD and SEMH.
- The Four key actions of the DSG deficit management plan were explained to the group;
 - Intervention
 - managing demand
 - sufficiency of local places and
 - financial management of the high needs block.
- Regular updates would be brought back to the budget working group and schools forum.

On behalf of the BWG Richard Foster highlighted how valued the SEN protection scheme had been to all schools but equally they appreciated, the challenging times the authority was in financially. Officers had explained to the group how the scheme was no longer being used as its original intended purpose and that this would be a phased removal which had provided them with some assurance. The group had requested further modelling which officers had provided in their presentation at the meeting.

Paul Jennings (Chair of the BWG) highlighted how this was an extremely challenging time having several authorities announcing this week how they were no longer financially viable. The SEN scheme had been in place and supported by the BWG for as long as he had been involved, but it was known then that it was a luxury, of which the authority could no longer afford. The financial pressures were undeniable and unavoidable, with no other option but to slow down the growth in the debt and thanked the BWG and colleagues who had been looking at this over the last few years. The plan moving forward looked incredible, and it was hoped that the authority would deliver on it and start to turn around the growing deficit and provide the quality services that their young people deserved.

The forum were appreciative of the work of the finance and governance teams and particularly to the Director, Education, Skills and Learning and her team for their excellent support of young people in Herefordshire.

The Cabinet Member Children and Young People assured the forum that he was briefed frequently on the detail of the high needs budget and the strategies being employed by the Director, Education, Skills and Learning and her team and would continue to provide support to these elements of work.

The Director, Education, Skills and Learning explained through her meetings particularly with the f40, reform was coming, but how extensive and far reaching that would be, was not known.

28. ANNUAL REVIEW OF SCHOOLS FORUM MEMBERSHIP AND CONSTITUTION

The clerk to the Schools Forum presented the report.

It was explained that using the spring 2025 School Census the annual review of membership had been conducted for the forum to ensure the allocation of seats remained proportionate. This year's review had followed the previous year in that there have been continued rises in the number of pupils attending Academies. The review therefore concluded in tables 14 & 18 that a change was needed to both the forum and working group to transfer 1 seat from the maintained schools to academies to maintain proportionality.

It was highlighted that the proposed constitution could be found at appendix 1 with the current constitution marked up with track changes at appendix 2 which highlighted all changes proposed.

Members were consulted on 3 June with the proposed changes, and their views also sought on a potential change to the members term of office and chair and vice chair term.

Originally a proposal was put forward that the chair and vice chair roles that currently held a two-year term of office to be aligned to the term of office of members at 3 years. However, after responses from members there were constructive arguments against the move with it being highlighted that the chair and vice chair roles carried greater weight of

responsibility and time. It was also noted that Chairs and vice chairs had no opportunity to serve as an ordinary forum member, and no other individual already on the forum was able in practice to put themselves forward for the role (as their term of office will by default be due to end before any take-up of tenure of Chairmanship/Vice Chairmanship).

Feedback also indicated that the forum would be open to extending the term of office for members to four years, as they had assurance they could resign at any point.

Therefore, it felt a sensible compromise for the two-year term of office for Chair and vice chair to remain against a four-year tenure of membership.

No comments were received from the forum.

Resolved that the outcome of the annual review of proportionality was noted and the revised constitution as set out at appendix 1 be recommended to the Corporate Director, Children and Young People for a formal decision and adoption.

29. ELECTION OF CHAIRPERSON OF THE BUDGET WORKING GROUP

The clerk to the Schools Forum offered her sincere thanks to Paul Jennings who had chaired the Budget Working Group for six years and paid tribute to the knowledge, expertise and insight he had brought that had been invaluable to the group but explained that it was time to appoint his successor.

The Service Director Education and Skills also expressed her thanks and that of the Local Authority for his balance between understanding the pressures that the Local Authority were under financially, but remaining supportive, and, above all keeping all decisions, very much centred together on children and young people in Herefordshire. Her thanks were also extended to the Chair of the Schools Forum.

Alison Banner nominated and proposed Richard Foster.

Paul Jennings seconded the nomination.

A vote was undertaken by the forum and Richard Foster was appointed as the Chairperson for the Budget Working Group.

30. DATES OF MEETINGS AND WORK PROGRAMME FOR 2025/26

The proposed meeting dates and work programme for the forum for 2025/26 were noted. No objections were raised.

The chair extended her thanks and that of the Forum to Kathy Weston, who had tended her resignation. She wished her well in her retirement and thanked her for her many years of support and contributions.

The clerk informed the forum that the Senior Finance Business Partner was leaving the authority and thanked her on behalf of the forum and budget working group. Many compliments had been passed on to her with regards to members feedback of her very clear and concise presentations.

The Senior Finance Business Partner expressed how she had enjoyed her time at Herefordshire Council, and how Schools Forum had been one of the highlights, having gotten to know the members and offered her thanks and best wishes. She assured the

forum that all officers that currently worked with her had full knowledge of what she did, and continuity would continue.

The meeting ended at 10:36

Chairperson



Title of report: Dedicated Schools Grant 2025/26 Quarter 2 Outturn

Meeting: Herefordshire Schools Forum

Meeting date: Friday 21 November 2025

Report by: Head of Strategic Finance (Deputy S151)

Classification

Open

Decision type

This is not an executive decision

Wards affected

(All Wards)

Purpose

To provide an update to the Schools Forum on the Dedicated Schools Grant (DSG) outturn as at 30 September 2025 (Quarter 2).

Recommendation(s)

That:

- a) **Schools Forum to note the current outturn position of the Dedicated Schools Grant (DSG) for 2025/26.**

Key considerations

1. Herefordshire's Dedicated Schools Grant (DSG) allocation for 2025/26 is as follows:

Block	Gross Allocation	NNDR Adjustment	Recoupment	Net Allocation
Schools Block	138,165,364	1,305,766	71,519,920	65,339,678
Central Block	933,855	0	0	933,855
High Needs Block	28,791,266	0	5,253,501	23,537,765
Early Years Block	24,066,374	0	0	24,066,374
DSG Allocation 2025/26	191,956,859	1,305,766	76,773,421	113,877,672

2. The DSG Allocation is as per the latest published allocations in July 2025, which reflect the Early Years adjustment for 2024/25 and 2025/26 and any import/export adjustments on the High Needs Block.
3. As at Quarter 2 reporting, the Dedicated Schools Grant is forecasting a £17.5 million deficit, relating to the pressures on the High Needs Block. The below table shows the Quarter 2 outturn by block:

Block	Budget (£'000)	Forecast (£ '000)	Variance (£'000)
Schools Block	65,340	65,340	0
Central Block	934	934	0
High Needs Block	23,538	41,052	17,514
Early Years Block	24,066	24,066	0
Total DSG 2025/26	113,878	131,392	17,514

4. The forecast deficit on the High Needs Block at the time of budget setting for 2025/26 was £20 million.
5. The reason for the variance of £2.5 million is because of reduced complex needs placements of £1.0 million, and independent placements and alternative education provisions being less than profiled at this stage of the year, alongside the average cost being lower than estimated in the budget.

6. The cumulative forecast deficit on the High Needs Block at the end of 2025/26 is currently £37.5 million:

	2022/23 (£m)	2023/24 (£m)	2024/25 (£mil)	Forecast 2025/26 (£mil)
DSG Deficit				
Outturn	1.1	5.0	13.9	17.5
DSG Deficit Cumulative Balance	1.1	6.1	20.0	37.5

7. The cumulative DSG deficit is accounted for as an unusable reserve on the council's Balance Sheet, as permitted via statutory instrument, which will remain in place until 31 March 2028 (extended by 2 years on 20th June 2025). This enables all local authorities to ring-fence the DSG deficit from the overall financial position in the statutory accounts. Beyond the period of the statutory override, the expectation is that any balance on the DSG Unusable Reserve will transfer back to the council's total Earmarked Reserves.
8. The risk to the council's overall financial position once the override period ends is being monitored alongside the assessment of the adequacy of the council's reserves, as part of the council's medium term financial strategy. It should be noted that this issue is a major concern amongst local authorities nationally.
9. Measures to contain the deficit and mitigate future cost and demand pressures will be managed by the Service through the DSG Deficit Management Plan and the financial impact of agreed mitigations will be monitored and reported throughout the year as part of the council's routine budget monitoring processes.

Community impact

10. Increasingly schools funding is directed by government, and the council can only allocate funding given by government. School governing bodies retain the responsibility to spend the school budget on meeting pupil needs. Schools, colleges and post-16 providers and potentially parents will need to be consulted on any changes to the high needs services.

Environmental Impact

11. This is a consultation with Schools Forum on school funding and will have no direct environmental impacts. School governing bodies and trustees are responsible for deciding on expenditure and they will be encouraged to minimise waste and resource use in line with the Council's Environmental Policy.

Equality duty

12. The Public Sector Equality Duty requires the Council to consider how it can positively contribute to the advancement of equality and good relations and demonstrate that it is paying 'due regard' in our decision making in the design of policies and in the delivery of services.
13. Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows: A public authority must, in the exercise of its functions, have due regard to the need to – (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act; (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
14. In relation to school finance, it is the responsibility of individual governing bodies to commit expenditure according to individual pupil need. Changes in high needs provision will require consultation with users and further advice from legal services will be sought should this be necessary. However, the decisions of the school forum should have regard to this duty and the potential implications of any decisions made.

Resource implications

15. This report relates to the Dedicated Schools Grant (DSG) only.

Legal implications

16. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) (Coronavirus) (Amendment) Regulations 2020, to enable members of the local school community to work in partnership with Herefordshire Council when making decisions about school funding and finances.
17. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2025.

Risk management

18. Budget Working Group (BWG) reviews all reports and proposals in detail prior to making recommendations to the Schools Forum. This two-stage process helps to ensure greater scrutiny of budget proposals and mitigate against any risks that may be identified. Any identified risks will be monitored and managed by the Children's and Young People directorate jointly with the Schools Forum.

Consultees

19. Budget Working Group (BWG) was consulted on 7 November 2025, who noted the contents of the report.

Appendices

Budget Working Group presentation 7 November 2025.

Background papers

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

BWG Budget Working Group (of Schools Forum)

DfE Department for Education

DSG Dedicated Schools Grant

NNDR National Non-Domestic Rates



Title of report: Schools National Funding Formula 2026/27 Update

Meeting: Herefordshire Schools Forum

Meeting date: Friday 21 November 2025

Report by: Head of Strategic Finance (Deputy S151)

Classification

Open

Decision type

This is not an executive decision

Wards affected

(All Wards)

Purpose

To provide an update to the Forum on the Schools National Funding Formula 2026/27, including the recommendations of the Budget Working Group (BWG) on the Herefordshire schools' budget 2026/27.

Recommendation(s)

That:

- a) **Schools Forum to review the budget approach for setting the schools 2026/27 budget; and**
- b) **Agree the draft 2026/27 budget to be prepared in line with the approach taken in 2025/26.**

Alternative options

1. Alternative options will be fully considered by the Budget Working Group (BWG) prior to formulating final budget recommendations for consideration by Schools Forum in January 2026. At this stage only a preliminary view has been sought in order to determine how the budget proposals can be developed further. The high needs budget will require further detailed work following the expected Department for education (DfE) funding announcement in December 2025 and recommendations will be agreed by Schools Forum in March 2026.

Further information on the subject of this report is available from
Stacey Carter, Head of Strategic Finance (Deputy S151), Email: Stacey.carter@herefordshire.gov.uk

Key considerations

2. On 30 June 2025 the DfE reported that due to the timing of the 2025 Spending Review, the announcement of the schools and high needs national funding formula (NFF) allocations for 2026/27 will be delayed and not be published until autumn this year.
3. The DfE have however published a summary policy document to help with planning, which sets out the structure of the schools National Funding Formula (NFF) for 2026/27, which shows there are no structural changes expected.
4. NFF allocations and supporting documentation (including operational guidance) will be published in Autumn 2025 due to the multi-year spending review concluding in June 2025. We expect that the Dedicated Schools Grant (DSG) allocations using the NFF will be published in December 2025 as in previous years.
5. As in prior years, the authority proforma tool (APT) will be released for local authority submissions in mid-December 2025 with a deadline return date towards the end of January 2026. The APT will again be populated from schools block data, primarily drawn from the autumn 2025 Schools' Census.
6. It is envisaged that the statutory deadline for budget setting at individual school level will remain, i.e. January 2026. In the absence of any funding announcement, the Budget Working Group (BWG) at its meeting on 7 November 2025 considered the principle that **Herefordshire's approach to school funding for 2026/27 should be in line with the approach used for 2025/26.**
7. Key Updates from the National Funding Formula 2026/27 Summary Policy Document:

National Funding Formula Factors 2026/27

The 2026/27 schools National Funding Formula (NFF) will use the same factors as the 2025/26. All individual factors will operate in the same way as 2025/26. See below table:

A	Basic per pupil funding	Basic entitlement					
B	Additional needs funding	Deprivation	Low prior attainment	English as an additional language	Mobility		
C	School-led funding	Lump sum	Sparsity	Premises			Growth
				Rates	PFI	Split sites	Exceptional premises
D	Geographic funding	Area cost adjustment					
E	Protection funding	Minimum per pupil level			Funding floor		

All Local Authorities must continue to move their local formula factor values at least a further 10% closer to the NFF Value. Herefordshire already mirrors the National Funding Formula.

Rolling in Previous Grants

The Schools Budget Support Grant (SBSG) and the National Insurance Contributions Grant (NICs) will be rolled into the NFF for 2026/27. The funding will be rolled into the Schools Block in a very similar approach to previous grants, by adding cash amounts to the National Funding Formula Factors.

For the NICs Grant, the funding rolled into the NFF will use the published funding rates directly. For the SBSG Grant, this will take a slightly different approach due to the grant issued in 2025/26 related to the full cost of the support staff award, as well as a part year cost of the 2024 teachers pay award from September 2025. The cash values will need to reflect the full year equivalent funding rates (the same approach that was took to rolling the previous Core Schools Budget Grant into the NFF in 2025/26).

The table below shows the amounts that will be added to the core factor values in the 2026/27 NFF in respect of the grants. For the SBSG, this represents the full-year equivalent amount. The area cost adjustment (ACA) calculation will be applied to these factors (where applicable):

Factor	NICs	SBSG	Total
Primary basic per-pupil	£78	£55	£133
Key stage 3 basic per-pupil	£68	£78	£146
Key stage 4 basic per-pupil	£77	£88	£165
Primary FSM6 per-pupil	£75	£49	£124
Secondary FSM6 per-pupil	£60	£72	£132
Lump sum	£2,400	£2,086	£4,486

That table below shows the amounts that will be added to the Minimum per Pupil Levels (MPPL) funding uplifts, and reflects the full year equivalent in respect of the SBSG Grant:

PPL	NICs uplifts	SBSG uplifts	Total
Primary MPPL	£93	£66	£159
Secondary MPPL	£83	£91	£174

Free School Meal Expansion

In June 2025, the government announced that, starting from September 2026, free school meals (FSM) will be extended to all children in households receiving Universal Credit. For 2026/27, there are no proposed changes to the schools NFF to allocate funding for the expansion of FSM. Instead, the funding needed for the FSM expansion will be provided

through a separate grant. Further details on how this grant will be calculated will be published separately in due course.

Dissapplications

All disapplication's are to be submitted before the 17 November 2025, this is to ensure decisions are communicated back to Local Authorities prior to the APT submission deadline. As per previous years, Herefordshire will be submitting one disapplication for 2026/27, which is noted under a separate agenda item.

Block Transfers

As in previous years, local authorities will be allowed to transfer up to and including 0.5% of the schools block into another block, with Schools Forum approval, without submitting a disapplication request. For a transfer exceeding 0.5%, or without schools forum approval, a disapplication request must be submitted to the Secretary of State.

De-delegations

Although de-delegations were not mentioned in the Policy Summary published document, we are assuming there will be no change to the principles and process of the de-delegated services. The details of Herefordshire's proposals for de-delegated services are noted under a separate agenda item.

8. Therefore, as per previous years, we propose to follow the following principles:
 - Seek to fund schools at the National Funding Formula values.
 - To fund schools at the maximum permitted Minimum Funding Guarantee (2025/26 value 0%).
 - De-delegations in place as at 2025/26 to remain for 2026/27 (proposed annual increase assumed in line with 2025/26 and will be reviewed once allocations are published in December 2025).

9. Using 2025/26, the indicative timescale for setting the schools budgets is as follows:
 - Publication of 2026/27 individual school budgets may follow last year's timeline, with provisional budgets issued in early January 2026 and final budgets in March 2026.
 - The expectation is that the January provisional budgets will reflect the schools funding settlement for 2026/27 and October 2025 verified School Census data (subject to this being provided by the DfE no later than mid-December).
 - Final budget decisions will then be taken by Schools Forum which will in turn produce final allocations for release to schools in March.

Community impact

10. Increasingly schools funding is directed by government, and the council can only allocate funding given by government. School governing bodies retain the responsibility to spend the school budget on meeting pupil needs. Schools, colleges and post-16 providers and potentially parents will need to be consulted on any changes to the high needs services

Environmental Impact

11. This is a consultation with Schools Forum on school funding and will have no direct environmental impacts. School governing bodies and trustees are responsible for deciding on expenditure and they will be encouraged to minimise waste and resource use in line with the Council's Environmental Policy.

Equality duty

12. The Public Sector Equality Duty requires the Council to consider how it can positively contribute to the advancement of equality and good relations and demonstrate that it is paying 'due regard' in our decision making in the design of policies and in the delivery of services.
13. Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows: A public authority must, in the exercise of its functions, have due regard to the need to – (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act; (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
14. In relation to school finance, it is the responsibility of individual governing bodies to commit expenditure according to individual pupil need. Changes in high needs provision will require consultation with users and further advice from legal services will be sought should this be necessary. However, the decisions of the school forum should have regard to this duty and the potential implications of any decisions made.

Resource implications

15. This report relates to the Dedicated Schools Grant (DSG) only.

Legal implications

16. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) (Coronavirus) (Amendment) Regulations 2020, to enable members of the local school community to work in partnership with Herefordshire Council when making decisions about school funding and finances.

17. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2025.

Risk management

18. Budget Working Group (BWG) reviews all reports and proposals in detail prior to making recommendations to the Schools Forum. This two-stage process helps to ensure greater scrutiny of budget proposals and mitigate against any risks that may be identified. Any identified risks will be monitored and managed by the Children and Young People directorate jointly with the Schools Forum.

Consultees

19. Budget Working Group (BWG) was consulted on 7 November 2025 and recommended the 2026/27 school budget be prepared on the same basis as 2025/26 in the absence of the final DfE operational guidance and technical notes. BWG will consider the budget proposals further once the DfE have announced the final DSG allocations in December 2025.

Appendices

Budget Working Group presentation 7 November 2025.

Background papers

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

ACA	Area Cost Adjustment
APT	Authority Proforma Tool
BWG	Budget Working Group (of Schools Forum)
DfE	Department for Education
DSG	Dedicated Schools Grant
FSM	Free School Meals
MPPL	Minimum per Pupil Levels
NFF	National Funding Formula
NICG	National Insurance Contributions Grant
SBSG	Schools Budget Support Grant



Title of report: Request to the Secretary of State to Disapply the School Finance Regulations

Meeting: Herefordshire Schools Forum

Meeting date: Friday 21 November 2025

Report by: Head of Strategic Finance (Deputy S151)

Classification

Open

Decision type

This is not an executive decision

Wards affected

(All Wards);

Purpose

To request the continued support of Schools Forum in respect of a Disapplication request to the Secretary of State for Education for exceptional circumstances for Eastnor Primary School's rent of additional classrooms.

Recommendation(s)

That:

- a) **To consider the request to disapply the Regulations which is outlined within this report; and**
- b) **Schools Forum to advise the Corporate Director, Children & Young People of Schools Forum's support or otherwise.**

Alternative options

1. If a disapplication is not approved, then this would put the lease at risk due to insufficient funds available within the existing school budget, as the transfer of additional funds would no longer be permissible. This would negatively impact on quality of educational delivery at the school.

Key considerations

2. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2025.
3. The Local Authority (LA) may submit an application to the Secretary of State for Education to disapply these regulations with the support of Schools Forum. In exceptional circumstances the LA may also submit a request with the support of Schools Forum.
4. If a request to disapply the regulations is approved by the Secretary of State for Education, then the approval is for that year only and further requests will be required to be submitted in future years if disapplication of the regulations is to continue.
5. Disapplication requests for 2026/27 financial year must be submitted on or before 17 November 2025.
6. Schools Forum is requested to continue to support the disapplication request for 2026/27 financial year for £17,000 to be set as exceptional funding to support the rent payment of additional classroom space. This request was previously supported by Schools Forum in 2024/25 and 2025/26.

Community impact

7. Increasingly schools funding is directed by government, and the council can only allocate funding given by government. School governing bodies retain the responsibility to spend the school budget on meeting pupil needs. Schools, colleges and post-16 providers and potentially parents will need to be consulted on any changes to the high needs services.

Environmental impact

8. This is a consultation with Schools Forum on school funding and will have no direct environmental impacts. School governing bodies and trustees are responsible for deciding on expenditure and they will be encouraged to minimise waste and resource use in line with the Council's Environmental Policy.

Equality duty

9. The Public Sector Equality Duty requires the Council to consider how it can positively contribute to the advancement of equality and good relations and demonstrate that it is paying 'due regard' in our decision making in the design of policies and in the delivery of services.
10. Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows: A public authority must, in the exercise of its functions, have due regard to the need to – (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act; (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

11. In relation to school finance, it is the responsibility of individual governing bodies to commit expenditure according to individual pupil need. Changes in high needs provision will require consultation with users, and further advice from legal services will be sought should this be necessary. However, the decisions of the school forum should have regard to this duty and the potential implications of any decisions made.

Resource implications

12. The school's budget is fully funded by Dedicated Schools Grant (DSG).

Legal implications

13. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) (Coronavirus) (Amendment) Regulations 2020, to enable members of the local school community to work in partnership with Herefordshire Council when making decisions about school funding and finances.
14. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2025.

Risk management

15. Budget Working Group (BWG) reviews all reports and proposals in detail prior to making recommendations to the Schools Forum. This two-stage process helps to ensure greater scrutiny of budget proposals and mitigate against any risks that may be identified. Any identified risks will be monitored and managed by the Children and Young People directorate jointly with the Schools Forum.

Consultees

16. Budget Working Group (BWG) was consulted on 7 November 2025 regarding the disapplication request and recommended the disapplication of £17,000 be approved by Schools Forum at the meeting on 21 November 2025.

Appendices

Budget Working Group presentation 7 November 2025.

Background papers

None.

Glossary of terms, abbreviations and acronyms used in this report

BWG	Budget Working Group (of Schools Forum)
DfE	Department for Education
DSG	Dedicated Schools Grant
LA	Local Authority



Title of report: De-Delegations and Education Management Function Proposal 2026/27

Meeting: Herefordshire Schools Forum

Meeting date: Friday 21 November 2025

Report by: Head of Strategic Finance (Deputy S151)

Classification

Open

Decision type

This is not an executive decision

Wards affected

(All Wards);

Purpose

To request Schools Forum agree the De-Delegated Services and the Education Management Function for 2026/27.

Recommendation(s)

That:

- **Consider the proposals for 2026/27 mainstream maintained schools De-Delegated Services and the Education Management Function set out in this report; and**
- **Schools Forum to advise the Corporate Director, Children & Young People of Schools Forum's support or otherwise.**

Key considerations

1. During budget setting each year, Schools Forum will be asked to approve the de-delegation of funding for centrally provided support based on a per pupil rate, considered to be a fair way of accounting for the size of the school and its budget.
2. The final de-delegation budget will be determined once the October 2025 pupil numbers are confirmed in the Authority Pro Forma Tool (APT), which is used to calculate the schools' budgets. The details of which will be presented to Schools Forum in January 2026.
3. For the purpose of this report, inflation has been applied to services as per 2025/26 budget setting. This will be updated once the final Schools Block has been confirmed by DfE in December 2025 and the final inflation will be confirmed at the Schools Forum meeting in January 2026.
4. Schools block de-delegation does not apply to special schools or pupil referral units (PRUs).

Recommendations for De-Delegations 2026/27

5. The current de-delegated services are:
 - a. Access Budgeting software
 - b. Free School Meals eligibility checking
 - c. EAL Service
 - d. Trade Unions
 - e. School Improvement Service
 - f. Contingencies
 - g. Behaviour Support Services
 - h. Education Management Function
6. A further breakdown of the de-delegated services is noted in the table below, including 2025/26 per pupil rates agreed by Schools Forum in January 2025 and a proposed inflationary increase for 2026/27, which will be updated once the Schools Block allocations are published in December 2025.
7. The forum will be required to vote on each service separately and by sector. Academy school representatives cannot vote on de-delegated services.

		2025/26			2026/27	
De-delegations	APT calculation basis	Rate £	Calculated No of Pupils/Schools	Total Amount £	Rate (with 2.36% inflation) £	Total Amount (based on 25/26 pupil numbers) £
Access budgeting software - computer license	Total number of schools	441.17	53.00	23,382.24	451.59	23,934.06
Free school meals eligibility checking	Primary pupil number	1.36	7,396.00	10,068.88	1.39	10,306.51
	Secondary pupil number	1.03	3,376.50	3,490.77	1.06	3,573.15
Total FSM eligibility checking				13,559.65		13,879.66
English additional language service - Support for underperforming ethnic minority groups and bilingual learners to provide EAL services for initial assessments, observations and advisory/monitoring visits	Combined primary & secondary pupil number	1.22	10,772.50	13,121.89	1.25	13,431.56
	Ever6 free school meals pupil number	7.23	2,092.89	15,124.60	7.40	15,481.55
	English additional language pupil number	37.55	720.38	27,047.30	38.43	27,685.62
Total english additional language service				55,293.79		56,598.72
Trade union facilities agreement	Primary pupil number (secondary use SLA service)	2.76	7,396.00	20,440.60	2.83	20,923.00
School improvement service	Combined primary & secondary pupil number	6.25	10,772.50	67,373.74	6.40	68,963.76
Contingencies	Combined primary & secondary pupil number	1.04	10,772.50	11,247.33	1.07	11,512.77
Behaviour support service	Primary pupil number	4.25	7,396.00	31,417.96	4.35	32,159.42
Total De-delegations				222,715.30		227,971.38
Education Management Functions	APT calculation basis	Rate £	Calculated No of Pupils/Schools	Total Amount £	Rate (with 2.36% inflation) £	Total Amount (based on 25/26 pupil numbers) £
Education Management Functions	Combined primary & secondary pupil number	13.04	10,772.50	140,481.93	13.35	143,797.30
Total Education Management Functions				140,481.93		143,797.30

Community impact

- Increasingly schools funding is directed by government, and the council can only allocate funding given by government. School governing bodies retain the responsibility to spend the school budget on meeting pupil needs. Schools, colleges and post-16 providers and potentially parents will need to be consulted on any changes to the high needs services.

Environmental impact

- This is a consultation with Schools Forum on school funding and will have no direct environmental impacts. School governing bodies and trustees are responsible for deciding on expenditure and they will be encouraged to minimise waste and resource use in line with the Council's Environmental Policy.

Equality duty

10. The Public Sector Equality Duty requires the Council to consider how it can positively contribute to the advancement of equality and good relations and demonstrate that it is paying 'due regard' in our decision making in the design of policies and in the delivery of services.
11. Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows: A public authority must, in the exercise of its functions, have due regard to the need to – (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act; (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
12. In relation to school finance, it is the responsibility of individual governing bodies to commit expenditure according to individual pupil need. Changes in high needs provision will require consultation with users, and further advice from legal services will be sought should this be necessary. However, the decisions of the school forum should have regard to this duty and the potential implications of any decisions made.

Resource implications

13. De-delegated services are funded from the Schools Block within the Dedicated Schools Grant.

Legal implications

14. The Schools Forum is a statutory decision making and consultative body constituted in line with the School Standards and Framework Act 1998, and its associated regulations, including the Schools Forum (England) (Coronavirus) (Amendment) Regulations 2020, to enable members of the local school community to work in partnership with Herefordshire Council when making decisions about school funding and finances.
15. The funding of schools is prescribed by the Department for Education (DfE) through the School and Early Years Finance (England) Regulations 2025.

Risk management

16. Budget Working Group (BWG) reviews all reports and proposals in detail prior to making recommendations to the Schools Forum. This two-stage process helps to ensure greater scrutiny of budget proposals and mitigate against any risks that may be identified. Any identified risks will be monitored and managed by the Children and Young People directorate jointly with the Schools Forum.

Consultees

17. Budget Working Group (BWG) was consulted on 7 November 2025 and recommended the de-delegated services and education management function budgets continue to be funded in 2026/27 and be prepared as set out in this report, pending the DSG funding announcement and validated October 2025 School Census data. BWG will consider the budget proposals further once the DfE have announced the final DSG allocations in December 2025.

Appendices

Budget Working Group presentation 7 November 2025.

Background papers

None.

Glossary of terms, abbreviations and acronyms used in this report

APT	Authority Pro-Forma Tool
BWG	Budget Working Group (of Schools Forum)
DfE	Department for Education
EAL	English Additional Language
PRUs	Pupil Referral Units

