



**Barnsley Metropolitan Borough Council
Children's Services Directorate**

Agenda

BARNSLEY SCHOOLS FORUM

Date: Thursday, 23rd October 2025
Time: 14.00 to 16.00
Location: The Boardroom, Westgate Plaza, Barnsley

Ref	Item	Papers	Officer
1	APOLOGIES FOR ABSENCE Welcome, Introductions and Apologies	Verbal	Chair
2	DECLARATIONS OF PECUNIARY AND NON-PECUNIARY INTEREST To consider any declarations of interest from members of the Schools Forum.	Verbal	Chair
3	MINUTES AND ACTION LOG OF THE PREVIOUS MEETING OF THE SCHOOLS FORUM To consider the minutes, action log and any matters arising from the Meeting of the Schools Forum, held on 17th July 2025	ENC A	Chair
ITEMS FOR DECISION:			
4	Annual Report of the Barnsley Schools Forum (2024/25) and Local Guide	Attached	Peter Bell
ITEMS FOR INFORMATION:			
5	Schools Budget: Latest Forecast Position (Quarter 2: 2025/26)	ENC B	Helen Perrin
6	Schools Funding Settlement and Arrangements for 2026/27	ENC C	Helen Perrin
CONFIDENTIAL ITEMS:			
7	Special Educational Needs Performance and Finance Report (Quarter 1: 2025/26)	ENC D	Sue Day
ANY OTHER URGENT BUSINESS:			
8	To consider any additional business which in the view of the Chair of the Schools Forum cannot wait until the next meeting.	Verbal	All

SCHEDULE OF FUTURE MEETINGS:

Date and Time of Future Meetings	Venue	Deadline for papers
Thursday 18 th December 2025 2.00pm	Room 1, Barnsley Town Hall	Friday 28th November
Tuesday 9th December 2025 2.00pm	Boardroom, Westgate Plaza.	Friday 5th December
Thursday 22nd January 2026 2.00pm	Boardroom, Westgate Plaza.	Friday 9th January
Tuesday 17th March 2026 2.00pm	Boardroom, Westgate Plaza.	Wednesday 4th March



Barnsley Metropolitan Borough Council Children's Services Directorate

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BARNSLEY SCHOOLS FORUM

**MINUTES OF THE MEETING OF THE FORUM HELD ON THURSDAY
17th JULY 2025**

MEETING ATTENDANCE

Name	Role	Present?
Officers /Non schools		
Katharine Knowles (KK)	Strategic Finance Business Partner (BMBC)	
Helen Perrin (HP)	Principal Accountant (BMBC)	✓
Nina Sleight (NS)	Service Director (BMBC)	✓
Anna Turner (AT)	Head of Education and Partnerships (BMBC)	✓
Sue Day (SD)	Head of SEND (BMBC)	✓
Eleanor Cooper (EC)	Governor Services adviser (BMBC)	✓
Lauren firth (LF)	Project Officer (BMBC)	✓

Councillors		
Cllr Ashley Peace (AP)	Councillor (BMBC)	
Cllr Janine Moyes (JM)	Councillor (BMBC)	
Cllr Ken Richardson (KR)	Councillor (BMBC)	✓

Primary Schools (LA)		
Simon Tabbner (ST)	Primary Headteacher	
Jackie Milliner (JM)	Primary Governor	✓

Primary Academy Officers		
Joe Woffinden (JW)	Primary Headteacher	✓
Katie Adamski (KA)	Principal	✓
Victoria Gorton (VG)	Primary Headteacher	

Primary Academy Governors		
Michael Sanderson (CHAIR)	Primary Academy Governor	✓
Peter Bell (PB)	School Governor	✓

Nursery Provision		
Simon Sykes (SS)	Teacher	✓

Early Years Provision		
Mel Szoke (MS)	Childcare Quality & Sufficiency Manager	✓
Secondary School (LA)		
Paul Crook (PC)	Secondary Headteacher	✓
Visseh Pejhan Sykes (VPS)	Secondary Maintained Governor	✓
Secondary Academy Officers		
Victoria Harrison (VH)	HCAT CFO	
Nigel Leeder (NL)	Governor	✓
Amir Arezoo (AA)	Associate Principal	✓
Education for Young People aged 16-19 Years		
Tom Smith (TS)	Head of Service	✓
Special & Alternative Provision		
Josh Greaves (JG) (VICE CHAIR)	Special Schools Headteacher /Board Representative	✓
George Wild (GW)	Springwell Learning Community & Greenacre Special school	✓

1. APOLOGIES FOR ABSENCE

Formal apologies were submitted from Margaret Gostelow, who has now resigned and Katharine Knowles.

2. DECLARATIONS OF INTEREST

As a serving Chair of a school governing body, Cllr Richardson declared an interest in the content of today's meeting.

3. MINUTES OF THE PREVIOUS MEETING OF THE SCHOOLS FORUM

The minutes of the meeting of the Forum held on the 18th March 2025 were agreed and approved as a correct record.

No other matters arose during consideration of these minutes.

AGENDA ITEMS FOR DECISION:

4. Review of Membership of the Barnsley Schools Forum

Several Schools Forum members' terms of office end in July, and following outreach, many expressed interest in continuing, with additional vacancies advertised. This led to a number of new appointments, which were welcomed as a positive development. Members were asked to note these updates and the fact that some vacancies remain, which will continue to be advertised throughout the academic year. It was also noted that long-standing member Margaret Gostelow has resigned, and the Forum expressed gratitude for her

service, with a suggestion to send a formal letter of thanks. An induction session for new members is planned for the autumn term to support their understanding of the Forum's operations.

Action: To send a formal letter of thanks to Margaret Gostelow for her services to the Schools Forum.

RESOLVED 1: That the outcomes of the recent review of membership be noted and further nominations be sought with a view to filling current vacancies.

5. Nomination of the Vice-Chair

A nomination was received for the position of Vice Chair, with Josh Greaves indicating his willingness to continue in the role. No other nominations were submitted, and the Forum unanimously agreed to appoint Josh as Vice Chair for a two year period. Members noted that his previous experience stepping in as Chair made the appointment a logical and appropriate choice.

Action: To send a formal letter of appointment to Josh Greaves for the position of Vice Chair.

RESOLVED 2: That Mr Josh Greaves be appointed as Vice-Chair of the Barnsley Schools Forum for a period of two years.

AGENDA ITEMS FOR INFORMATION:

6. The group considered the following reports by the Service Director (Finance).

a. Schools Budget (2024/25) Year-end Outturn

The Forum received the outturn report for the 2024/25 schools budget. Members noted the improved financial position compared to earlier forecasts, largely due to additional early years funding received late in the year. Concerns were raised about the number of maintained schools ending the year in deficit, and the need for recovery plans was emphasised. The central retained DSG budget also showed a deficit, primarily driven by pressures in the high needs block and SEND funding. The cumulative DSG deficit remains significant, though partially offset by safety valve payments. The report was noted without further questions.

RESOLVED 3: That the Schools Forum notes the final outturn position for the schools' delegated budget, particularly the carry forward of balances for maintained schools and the reported deficit on the centrally retained DSG budgets.

b. Schools Budget (2025/26) Latest Position and Evaluation of Risks

An update was provided on the current financial year's budget. Members discussed emerging financial risks, including declining surplus balances and a growing number of schools forecasting deficits. The projected increase in

EHCPs and demand for specialist placements was highlighted as a key driver of the rising high needs deficit. Concerns were expressed about the long-term financial sustainability of maintained schools, with projections showing many may face deficits by 2027/28. Additional discussion focused on the impact of out-of-borough placements, reduced birth rates, and limited pupil premium funding, with schools adapting through creative staffing models. It was noted that these challenges are being faced nationally and is not unique to Barnsley. The Forum acknowledged the challenges and agreed to continue monitoring the situation closely.

RESOLVED 4: That the Schools Forum notes the latest DSG funding for schools during 2025-26, including the projected increase in EHCPs and demand for specialist placements, together with long-term financial sustainability positions of Barnsley's maintained schools and the identified financial risks against the schools DSG budgets for the year. The Schools Forum further notes that these challenges are being faced nationally and are not unique to Barnsley.

CONFIDENTIAL AGENDA ITEMS:

7. Special Educational Needs Performance and Finance Report (Quarter 4: 2024/25)

The Forum received an update on SEN performance and financial pressures. It was noted that the number of Education, Health and Care Plans (EHCPs) has exceeded 3,000 and continues to rise, contributing significantly to high needs budget pressures. Members discussed the impact of delayed free school and AP school projects, and the mitigation measures taken, including primary schools stepping forward to offer additional resource provision. Fifteen new places are expected in September, with further secondary provision anticipated in the spring term. The statutory override for DSG deficits has been extended to 2027/28, allowing more time for reforms, including a potential White Paper in the Autumn.

Forum members expressed concern about national uncertainty and emphasised the importance of local action. SD confirmed that engagement with providers remains active and that efforts to expand provision are ongoing. The Forum discussed the possibility of writing to the DfE to highlight local challenges, but it was confirmed that the Department is already well informed of Barnsley's situation. The item was noted with appreciation for the continued work and collaboration across the system.

RESOLVED 5:

- **That the Schools Forum notes the progress to date and the actions taken to ensure system-wide improvements to support children and young people with special educational needs, including a disability (SEND);**
- **That the Schools Forum notes the ongoing work to secure children's, young people's and parent/carer voice at all levels of the system;**
- **That the Schools Forum notes the latest financial forecast in respect of the SEND/high needs block, and specifically performance against the Safety Valve Programme action plan and conditions.**

8. ANY OTHER URGENT BUSINESS

No urgent business was raised.

9. SCHEDULE OF FUTURE MEETINGS (2025/2026)

The following meeting dates were noted (venue: Boardroom, Westgate Plaza):

- Thursday 23rd October 2025 2.00pm
- Tuesday 9th December 2025 2.00pm
- Thursday 22nd January 2026 2.00pm
- Tuesday 17th March 2026 2.00pm

The Chair commended the strong attendance at the meeting, both in person and online, and encouraged members to attend the January 2026 meeting in person due to the significance of the decisions expected at that time. Members were thanked for their contributions and wished a pleasant summer break.

Action: To book a larger venue for the meeting due to be held on the 22nd January 2026 at 2.00pm.

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(Signed by the Chair of the Barnsley Schools Forum)



BARNSLEY SCHOOLS FORUM

ACTION LOG OF THE MEETING OF THE FORUM HELD ON THURSDAY 23rd October 2025

REF	DATE	ACTION	LEAD	UPDATE	STATUS
4	23.10.2025	<p><u>Annual Report of the Barnsley Schools Forum (2024/25) and Local Guide</u></p> <p>Peter to amend the Annual report of the Schools Forum to separate suspension data by primary and secondary schools.</p>	PB		New Action
5	23.10.2025	<p><u>Annual Report of the Barnsley Schools Forum (2024/25) and Local Guide</u></p> <p>Peter to correct the typo on page 6 of the Annual Report of the Schools Forum.</p>	PB		New Action
6	23.10.2025	<p><u>Schools Budget: Latest Forecast Position (Quarter 2: 2025/26)</u></p> <p>Kat/Helen to update the deficit commentary to reflect geographic and demographic factors, not just school size.</p>	KK/HP		New Action
7	23.10.2025	<p><u>Schools Budget: Latest Forecast Position (Quarter 2: 2025/26)</u></p> <p>Kat/Helen and team to continue close engagement and support for schools with significant budget swings, including Sacred</p>	KK/HP		New Action



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		Heart Primary and Penniston Grammar.			
8	23.10.2025	<p><u>Schools Budget: Latest Forecast Position (Quarter 2: 2025/26)</u></p> <p>Kat/Helen to correct any table header typos and ensure clarity in future reports.</p>	KK/HP		New Action
9	23.10.2025	<p><u>Schools Funding Settlement and Arrangements for 2026/27</u></p> <p>Kat/Helen to monitor DfE guidance and provide updates to the forum as soon as settlement figures are released.</p>	KK/HP		New Action
10	23.10.2025	<p><u>Special Educational Needs Performance and Finance Report (Quarter 1: 2025/26)</u></p> <p>Sue and Nina to present co-produced proposals in January 2026, focused on redirecting funding from out-of-borough placements to support in-borough provision. Lauren to add to forward plan.</p>	LF	27.10.2025 – Complete, LF added to forward plan for Jan 2026.	Complete
11	23.10.2025	<p><u>Special Educational Needs Performance and Finance Report (Quarter 1: 2025/26)</u></p> <p>Sue to follow up on the potential use of existing school space for SEN provision as part of the capital estate review.</p>	SD		New Action

ONGOING ACTIONS



Barnsley Metropolitan Borough Council Children's Services Directorate

REF	DATE	ACTION	LEAD	UPDATE	STATUS
		No ongoing actions			

COMPLETED ACTIONS

REF	DATE	ACTION	LEAD	UPDATE	STATUS
3	17.07.2025	<u>SCHEDULE OF FUTURE MEETINGS (2025/2026)</u> To book a larger venue for the meeting due to be held on the 22 nd January 2026 at 2.00pm.	EC	17.07.2025- EC booked the Town Hall for this meeting.	Complete
2	17.07.2025	<u>Nomination of the Vice-Chair</u> To send a formal letter of appointment to Josh Greaves for the position of Vice Chair.	EC	17.07.2025 – EC sent the formal letter of appointment to Josh Greaves.	Complete
1	17.07.2025	<u>Review of Membership of the Barnsley Schools Forum</u> To send a formal letter of thanks to Margaret Gostelow for her services to the Schools Forum.	TBC	14.10.2025 – Anna confirmed that this was complete	Complete



Annual Report of the Barnsley Schools Forum (2024/2025)

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Introduction

Welcome to the annual report of the Barnsley Schools Forum. Here you will learn more about the work which the Forum undertook during 2024/2025 to ensure all our schools and settings in the Borough were equipped with the funding to improve teaching and learning standards and provide a supportive environment for all children and young people at every stage of the National Curriculum.

The Forum is part of a broader landscape whose shared vision is to help develop a local, inclusive system which enables all children and young people in the Borough to achieve their potential, irrespective of their circumstances and characteristics. A key responsibility of the Forum is to help ensure that the funding provided to schools and settings is sufficient, effectively used and provides value for money. For that reason, the Forum's membership is designed to reflect the range of schools, settings and other interested parties, and to ensure that what at times can be difficult decisions are made in the best interests of the whole of the local system. This is the role which the Forum will continue to perform during 2025/2026.

Whether you are a parent, school leader, teacher, governor or someone with an interest in how schools are funded, I hope you find this annual report interesting and informative.

Michael Sanderson

(Chair of the Barnsley Schools Forum)

Local Guide to the Barnsley Schools Forum

In Barnsley, we have produced a *Local Guide* for members of the Forum, together with anyone who may be interested in learning more about its work. A copy of the Local Guide may be viewed via the Barnsley Schools Forum Web Page at:

<https://www.barnsley.gov.uk/services/children-families-and-education/schools-and-learning/schools-forum/schools-forum-members-protocol/>

The Local Guide outlines the following information:

- The role and responsibilities of the Forum as set out in the Schools Forum (England) Regulations (2012)
- Representation and membership of the Forum
- The Forum's Constitution and Terms of Reference
- Nominations and appointments to the Forum
- Arrangements for meetings of the Forum and how the public can get involved.

If you would like to know more about the work of the Barnsley Schools Forum please e-mail:

Admin-GovernorsServices@barnsley.gov.uk

Issues Considered by the Barnsley Schools Forum During 2024/2025

As part of its role both as a consultee and decision-taker in matters concerning education and school funding, the Forum considered the following:

- Regular monitoring of Schools and Early Years Education Budgets (2024/2025) including variations in expenditure; school balances and reserves.
- Regular monitoring of High Needs Block funding, including Barnsley Council's management plan for tackling the deficit and bringing expenditure. This included consideration of the Council's involvement in the Department for Education's '*Safety Valve*' intervention programme, aimed at closing the current deficit in the High Needs Block budget and to help develop a more sustainable system for meeting the education needs of vulnerable young people in accordance with the Government's national Special Educational Needs and Alternative Provision Improvement Plan and *Road Map*, published earlier this year.
- As part of this, quarterly reports continued to be considered on the sufficiency of education provision for children and young people with special educational needs, together with the measures taken to ensure more school places are created within local mainstream and special settings as well as to support their wellbeing whilst at school and improve attainment.
- The outcome of Barnsley Council's consultation with schools on proposed changes to the local schools funding formula, including the criteria for awarding funding to schools and settings which operated from multiple or split sites.
- The Borough's funding settlement for schools during the period 2024/2025, including allocations to the Schools Block; Early Years Block and High Needs Block, together with arrangements for the continued funding of school improvement activity and both statutory and historic commitments including school admissions, education welfare, eligibility for free school meals, pension costs and teaching staff cover.

Membership of the Schools Forum

This work could not have been completed without the dedication and commitment of the Forum's membership. This year we have recruited additional representatives who will add considerable value to the Forum's work, during 2025/26. Therefore, I would like to welcome the following new members:

- Councillor J. Moyes: Local Elected Member
- Mrs J Milliner: LA Maintained Primary School Governor - Athersley North Primary School
- Mr G Wild: Springwell Learning Community and Chair, Greenacre Special School
- Mrs K Adamski: Carrfield Primary Academy
- Mrs V Pehjan-Sykes: LA Maintained Secondary School Governor
- Mr N Leeder: Secondary Academy Governor/Representative

Details concerning the current membership of the Forum can be found in the Local Guide or on the Schools Forum's Web page at:

<https://www.barnsley.gov.uk/services/children-families-and-education/schools-and-learning/schools-forum/>

Performance and Critical Success Factors 2024/25

Whilst the Barnsley School Forum does not have a specific set of its own critical success factors or indicators of its own performance, the Forum does perform a valuable role in supporting the following outcomes within the Council.

LEARNING BARNLSLEY	Polarity	Target	Q1	Q2	Q3	Q4
Early Years and Childcare settings rated Good or Outstanding by Ofsted	High	98.00%	96.20%	95.00%	95.70%	96.00%
Secondary School Attendance	High	91.00%	86.30%	92.50%	90.90%	91.00%
Primary School Attendance	High	94.10%	93.60%	94.90%	94.90%	94.70%
Number of Suspensions in all Schools	Low	7000 (Cumulative)	1983	3065	5191	-
Number of Visits to Libraries (Digital & Physical)	High	170000	159980	185447	165353	175917
Care Leavers aged 19-21 engaged in Education, Employment or Training	High	55.00%	55.60%	65.00%	62.30%	63.50%
Percentage of Children on SEN Support in Schools	High	12.20%	12.58%	12.58%	12.70%	13.00%
Proportion of Educational Settings judged Good or Outstanding by Ofsted	High	93.00%	94.50%	94.50%	94.44%	94.32%
Take up of 2 year old Childcare for those eligible through Economic Criteria	High	77.00%	78.00%	78.88%	77.86%	77.40%
Young People aged 10 - 17 years entering the Youth Justice System for the First Time	Low	29	8	16	17	22

Early Years & Childcare Settings rated Good or Outstanding by Ofsted

Although we are currently below the agreed target for Barnsley, there have been many new providers (46) that are awaiting their inspection which we expect to achieve “Good” or “Outstanding” in the coming months. There has been 1 Day Nursery which was rated “Inadequate”, and another rated “Inadequate” provider has been reinspected to “Good”. The service are working with providers to support their Early Years settings in comparison to the previous quarter. The result of this is that we have less requires improvement and inadequate settings (4 RI and 2 inadequate) and we have seen 2 childminding settings close due to retirement and resignation.

Secondary School Attendance / Primary Attendance

Our efforts and ambition in relation to our co-produced “Every Child in School Every Day” Plan demonstrates some pleasing statistics at year end, with secondaries being broadly in line with the national picture (which sits at 91.80%) and Primary Schools reporting at 94.70%, which is 0.2% below target. 4 of the 11 secondaries are in line or above the national picture, with 3 schools at 90% and 4 schools achieving 89%. When considering our primary schools there are some schools reporting attendance upwards of 96%.

Number of Suspensions in Schools

The year end overall suspension target for the full academic year was 7000 across all schools.

Issues around the automated data feed between schools and Barnsley’s case management system have been identified which has resulted in discrepancies between school data and that held locally. As such suspensions data cannot be reported in full due to inaccuracies resulting from an incomplete data set. This issue is currently with our provider awaiting resolution. It is important to note that from September 2025 all our schools and academies have agreed for the Local Authority to access the DfE Wanders Attendance system. This will mean that there is access to live data going forward.

Looking Forward: The Barnsley Schools Forum's Work Programme for 2025/2026

In compliance with its statutory role, the Forum will continue to act both as a consultee and decision-taker on matters relating to schools funding in the Borough. This will be combined with its role as a key constituent within the local schools' sector as part of developing a schools' system which meets the needs and helps fulfil the aspirations of all children and young people in Barnsley. A copy of the Forum's proposed forward plan for 2025/2026 is outlined in the Appendix A to the annual report.

Feedback

If you have any comments on the annual report, please let us know by e-mailing:

Admin-GovernorsServices@barnsley.gov.uk

Barnsley Schools Forum Forward Plan 2025/2026

Date of the meeting	Issues to be considered
17 July 2025	<ul style="list-style-type: none"> (a) Schools Budget (2024/25) Year-end Outturn (b) Schools Budget (2025/26) Latest Position and Evaluation of Risks (c) Special Educational Needs Performance and Finance Report (Quarter 4: 2024/25) (d) Review of Membership of the Barnsley Schools Forum
23 October 2025	<ul style="list-style-type: none"> (a) Schools Budget: Latest Forecast Position (Quarter 1: 2025/26) (b) Schools Funding Settlement and Arrangements for 2026/27 (c) Special Educational Needs Performance and Finance Report (Quarter 1: 2025/26) (d) Annual Report of the Barnsley Schools Forum (2024/25) and Local Guide
9 December 2025	<ul style="list-style-type: none"> (a) Outcome of the Local Authority’s consultation with schools on proposed changes to the Local Schools Funding Formula (<i>this matter will require a vote and the meeting must be quorate</i>)
22 January 2026	<ul style="list-style-type: none"> (a) Schools Budget Out turn Report (Quarter 2: 2025/26) (b) Schools Funding: Budget Allocations (2026/27) (c) Schools Block Dedicated Budget (2026/27) (d) Early Years Block Dedicated Budget (2026/27) (e) Central School Services Budget Block (2026/27) (f) Provisional Education Outcomes in the Borough (2025) (g) Special Educational Needs Performance and Finance Report (Quarter 2: 2025/26) <p><i>(items’ c, d and e may require a vote and the meeting must be quorate)</i></p>

Date of the meeting	Issues to be considered
17 March 2026	(a) Election of the Vice-Chair for the Schools Forum (b) Special Educational Needs Performance and Finance Report (Quarter 3: 2025/26) (c) High Needs Budget Block (2026/27)

Barnsley Schools Forum Future Planned Dates:

SCHEDULE OF FUTURE MEETINGS:		
Date and Time of Future Meetings	Venue	Deadline for papers
Thursday 18 th December 2025 2.00pm	Boardroom, Westgate Plaza.	Friday 5th December
Thursday 22nd January 2026 2.00pm	Boardroom, Westgate Plaza.	Friday 9th January
Tuesday 17th March 2026 2.00pm	Boardroom, Westgate Plaza.	Wednesday 4th March



Barnsley Metropolitan Borough Council
Children's Services Directorate

Schools Forum

Item

Title: Schools Budget 2025/26 – Latest Outturn Position

Date: 23rd October 2025

Author: Helen Perrin (BMBC Finance)

PURPOSE OF THE REPORT

1. To inform the Forum of the 2025/26 latest outturn (based on quarter 2 spend position) of the delegated budget for **maintained schools** and centrally retained budgets – both of which are funded from the Dedicated Schools Grant (DSG).

RECOMMENDATIONS

2. The following are the main recommendations:

FOR INFORMATION

1. **Note the latest projected outturn position for the schools' delegated budget and the centrally retained DSG budgets, particularly projected deficit position on the high needs block;**

OVERALL DSG BUDGETS 2025/26

3. The revised approved schools' budget (dedicated schools grant funding) for 2025/26 totals £123.6M (as confirmed by DfE in July 2025). This excludes budgets relating to schools that have converted to academies (59 schools in total). The overall revised schools budget, analysed by funding blocks between delegated and centrally retained, is outlined in the table below:

	Delegated Budgets to Schools £M	Centrally Retained Budgets £M	Total £M
Schools Block *	47.0	0.5	47.5
High Needs Pupils	12.0	27.4	39.4
Early Years	6.3	28.7	35.0
Central Schools Services	-	1.7	1.7
	65.3	58.3	123.6

**The above reflects transfers from Schools to High Needs block (£1.7m)*

4. The above DSG budget excludes the following schools related funding;
- ✓ **Carry forward schools' balances** – a total net surplus balances of £3.0M was carried forward by maintained schools from the previous year into 2025/26 financial year.
 - ✓ **Pupil Premium Grant** – a total of £3.8M has been allocated to maintained schools for 2025/26 financial year.
 - ✓ **EFA Post 16** funding – a total of £1.7M has been allocated in the year relating to post 16 provision (mainly in relation to Penistone Grammar school) and formed part of their delegated funding.
 - ✓ **Other specific grant funding for schools** – certain grant funding would be made available by the EFA in the current financial year and allocated directly to schools in accordance with the grant conditions e.g. Universal Infant Free School Meals, Primary PE & Sports grant, Schools budget support grant (SBSG), National Insurance contributions (NICs) grant.
5. The overall resources available to schools can be analysed between the 2 main elements, the amount delegated to schools and the amount centrally retained / managed by the Council on behalf of schools.

SCHOOLS DELEGATED DSG BUDGET

6. DSG delegated funding has been allocated to individual schools through the local schools funding formula. A funding adjustment of £1.7M was made to the school block funding to reflect the confirmed DfE decision on the funding transfer application made by the Council to transfer from the school's block to the high needs block 1%.
7. Consequently, the total revised DSG budget directly managed by maintained schools is **£65.3M** (after adjustment for academies, Growth Fund and de-delegated transfer). This is in addition to the £3.0M of school balances carried

forward from 2024/25 and was incorporated within the detailed budgets of all the various schools.

8. The latest 2025/26 projected outturn position for all maintained schools based on the last submitted quarterly returns from schools is summarised in the table below:

Surplus Balance	2024/25 Outturn £M	2025/26 Original Budget £M	2025/26 Forecast Outturn £M
Primary	1,868	790	839
Secondary	1,146	27	27
	3,014	818	866

9. The following are the key points to note from the above projected outturn information on schools' balances:

- There is a noticeable reduction in overall surplus schools' balances when compared to the previous year's outturn position.
- Latest outturn estimates appear to be consistent with original planning assumptions made by schools and show a slight increase in the forecast surplus position.
- There are several primary schools, with small forecast surplus balances reported for the year (3 schools with less than £10k). These schools have very limited scope and flexibility within their budget to meet current cost pressures.
- 6 schools are forecasting a deficit balance in 2025/26 as detailed in the table below:

Summary of Deficit budgets	2024/25 closing position	Planned Budget 2025/26	Latest Reported position	Change in Position
Millhouse Primary School	40,125	-40,468	-31,515	8,953
Penistone St Johns Primary School	-5,277	-98,951	-98,135	816
Sacred Heart Primary School	47,977	28,201	-20,819	-49,020
Silkstone Primary School	-2,507	-23,180	-5,103	18,077
Springvale Primary School	-5,481	-10,036	-35,318	-25,282
Thurlstone Primary School	-17,117	-46,057	-46,057	0
Total Deficit	57,719	-190,491	-236,947	-46,456

- Discussions have been held with the above schools (as part of the budget planning process) on how they would address their deficit position. Where possible, recovery and actions have been put in place to address the deficit with a view of bringing the school back into a balanced position within an agreed timeframe.
- Schools continue to raise financial sustainability concerns regarding increasing cost pressures associated with the cost-of-living crisis and previous high levels of inflation (surpluses have been utilised to mitigate the increased costs). This is despite the additional supplementary grant funding made available by the government to schools in previous financial years. The impact of increasing cost pressures is more prevalent in the smaller primary schools who are already under budget pressure from reducing pupil numbers, and therefore have limited scope to absorb such cost increases.
- The council is cognisant of the increasing number of schools who are projecting a deficit position, and a strategic meetings have been held to discuss schools' future financial strategy, with a working group to be established.

CENTRALLY RETAINED SCHOOLS BUDGETS

10. These relate to several DSG budgets that are managed by the Council, where it is cost-effective to do so as opposed to delegating them directly to schools. The nature of expenditure that can be charged against centrally retained DSG is detailed in the School Finance Regulations.
11. The total DSG budget (across all the funding blocks) that is centrally retained and managed by the Council is **£58.3M**. The table below shows the budget split between the main funding blocks and the forecast outturn position for each block.

<u>Centrally Retained DSG Budgets</u>	Budget £M	Forecast £M	Over (+) / Under (-) spend £M
Schools Block	0.5	0.6	+0.1
High Needs Block	27.4	33.9	+6.5
Early Years Block	28.7	28.7	0.0
Central School Services	1.7	1.7	0.0
	58.3	64.9	+6.6

12. The financial position across all the centrally retained DSG budgets shows an overall overspend of **£6.6M** an increase of £2.1M compared to the originally planned deficit £4.5M, and an increase of £1.7M when compared to the Q1 position. The overspend mainly relates to the high needs funding

block. The following is an explanation of the key budget variances within the high needs block:

- Increase in INMSS & Other LA placements (£2.9M) – Due to the increasing demand for specialist places there has been an increase in placements of 54 compared to the planned 10 in INMSS and a net increase of 14 in Other LA Special Schools. This has resulted in additional cost pressure of £2.9M.
- Shortfall on plan savings (£0.5M) - the Council is on track to achieve 70% of its 2025/26 savings target (£1.8M) built into the 2025/26 high needs budget. However, a shortfall of £0.5M against the savings target is currently forecast due to lower than planned number of post-16 and pre 16 pupils being returned from INMSS back into local in borough provision by Sept 2025.
- Slippage in new SEND places (-£2.2M) – Due to a delay in the creation of the planned 130 placements the Council will incur reduced costs for commissioned placements. However, this has resulted in a consequential increase in demand and costs for out of borough placements.
- Increase in Mainstream Education, Health & Care Plan (EHCP) numbers and costs (£0.3M) – this cost pressure has arisen due to the increase in the number of EHCP Plans being delivered in mainstream schools. There is also an increase in high needs top up funding levels.
- Increase in Tuition and AP Provision (£0.6M) – increase in the level of children needing tuition which is linked to a number of reasons: additional AP requirements, placement breakdown, schools inclusivity and sufficiency of places.

Managing financial risks

13. Under the DSG grant conditions, deficits are expected to be managed across the DSG budgets, with the flexibility for a deficit to be carried forward to future years.
14. There are also several identified risks that have emerged which could put further pressure on the deficit position:
 - Increase in EHCP numbers and pupils in mainstream and special schools. This is being addressed by managing demand through a focused piece of work, strengthening the front door and securing support at SEN support level.
 - Increase in EHCP numbers over and above the forecast position, with no sign of slowing down/reducing.
 - Increase in requests for specialist placements.
 - Increasing number of requests for additional funding from schools and

settings. This is being addressed by requiring schools to provide supporting evidence and rationale for such request – which are then presented to the panel to inform decision making.

- Increase number of placements directed following tribunal appeals. This has been mitigated by giving careful consideration to all appeals lodged, taking a needs-led approach to children & young people.
 - Increased uptake within Early Years new 2 year old and under 2's is greater than the current DfE grant allocation and no adjustment is made before year end.
15. The latest overall financial risk in 2025/26 is **£17.8M**. This is made up of the cumulative **£13.9M** plus the **£6.6M** forecast deficit for 2025/26, offset by the 2025/26 safety valve payment of **£2.75M** (£13.9M + £6.6M - £2.75M).
16. The DSG Management Plan continues to form the basis for managing financial risks as it details the actions / measures for bringing the DSG spend back into balance over the medium term as agreed in the Safety Valve Agreement. The plan outlines projected cost pressures, it set outs the plans for commissioning additional and suitable specialist places locally to reduce reliance on INMSS. and planned actions/ measures to be implemented over the medium term to help bring spend back to a sustainable level by 2026/27.

Annex 1 - Centrally Retained Budgets -25/26 (Q2)	<u>2025/26 Budget</u>	<u>Forecast Outturn</u>	Forecast variance
SCHOOLS BLOCK	(£)	(£)	(£)
<u>Schools - Delegated budgets</u>			-
school contingency	191,495		-191,495
Free school meals eligibility	5,485	5,485	-
Staff costs supply cover	124,082	393,434	269,352
<u>Schools - Top sliced Budgets</u>			
Education Function - Brokerage Grant	111,582	111,582	-
Growth Fund	100,000	100,000	-
Looked after children	200,000	200,000	-
schools causing concern	395,000	395,000	-
School admissions	275,000	275,000	-
Licences/subscriptions	231,916	231,916	-
Servicing of schools forums	7,000	7,000	-
ESG retained duties	582,678	582,678	-
	2,224,238	2,302,095	77,857
HIGH NEEDS BLOCK			
Specialist resource provisions	2,757,730	2,796,650	38,920
SALT provision	145,000	145,000	-
Out of Authority - INMSS / OLAs	20,415,593	23,835,926	3,420,333
SEN support and SEND Improvement services	2,146,741	1,845,741	-301,000
SEND strategy - increased SEMH/SLCN	2,507,237	356,688	-2,150,549
Tuition/Hospital/Personal Budgets/Ap Provision	479,000	1,081,755	602,755
Direct Entry pre 14-16	235,000	355,000	120,000
Special Schools & Mainstream Top up		204,439	204,439
School Improvement - virtual school	50,000	50,000	-
Home to school transport - satellite prov	50,000	50,000	-
Barnsley College (Post 16 provision) & Independent Specialist Providers	3,112,648	3,112,648	-
Over commitment	- 4,636,803		4,636,803
	27,262,146	33,833,847	6,571,701
EARLY YEARS BLOCK			
EYSFF - PVI's 3 & 4 year old	8,673,128	8,864,580	191,452
EY PVI's 2 year old funding - Disadvantaged	2,185,551	2,327,260	141,709
EY PVI's 2 year old funding - Working Parent	6,199,828	6,199,828	-
EY PVI's under 2 year old funding	9,181,103	9,181,103	-
EYSF centrally retained	468,768		-468,768
Inclusion Fund	213,964	254,550	40,586
Disability Access Fund	235,438	235,438	-
EY Pupil Premium - Contingency	236,568		-236,568
Early Years adjustment 2024/25		331,589	331,589
	27,394,349	27,394,348	-0
OVERALL CENTRAL DSG BUDGETS	56,880,733	63,530,290	6,649,558



Barnsley Metropolitan Borough Council
People Directorate

Schools Forum Agenda Item

Title: Schools' funding arrangements (2026/27)

Date: 23rd October 2025

Author: Helen Perrin (Principal Accountant)

Purpose

1. The purpose of this report is to outline the key changes in the funding arrangements for 2026/27. This report will also highlight the key items for consultation with schools to inform the setting of budgets for 2026/27.

Recommendations

2. **The following are recommended:**
 - **Note the published summary policy and key changes in the funding arrangements for schools for next year, which would inform the basis of the consultation with schools.**
 - **Note the schools funding settlement for 2026/27, will be announced autumn 2025.**

Schools Funding Settlement

3. The Government at the end of June 2025 published a summary policy document that sets out the structure of the schools national funding formula (NFF) for 2026/27 including which factors will be used, how they will operate, along with requirements on local authorities funding formulae.
4. The policy document does not provide any indication on funding levels for 2026/27, these will be confirmed when the NFF allocations are published in autumn 2025. A report will be presented at the December school forum to update on the confirmed 2026/27 Schools Funding Settlement.
5. In 2026/27 local authorities will remain responsible for determining final allocations to schools, in consultation with the school's forum but will be required to start bringing their own local formulae closer to the schools NFF. In particular:

- Local authorities will only be allowed to use NFF factors in their local formulae, and must use all NFF factors, except for any locally determined premises factors.
- Local authorities will also be required to move their local formulae factors at least 10% closer to the NFF values, compared to where they were in 2025-26, unless they are already mirroring the NFF. For this purpose, local factor values within +/-2.5% of the respective NFF values are deemed to be “mirroring” the NFF. As part of the tightening requirement, local authorities are not allowed to ‘overshoot’ the NFF value by more than the +/-2.5% mirroring threshold.

Schools Funding Arrangements 2026/27

10. The Government published the 2026/27 schools NFF summary policy document in June 2025, which is intended to help local authorities to plan the local implementation of the funding system for 2026/27. The following summarises the key changes in the schools NFF for next financial year:

Schools Block

- The Schools NFF for 2026/27 will have the same funding factors as in the current year.
- NFF factor values for 2026/27 will be published in autumn 2025.
- The minimum per pupil funding levels (MPPL) for primary schools and secondary schools will be confirmed in autumn 2025. This is a mandatory factor in local authorities schools’ formulae.
- Local authorities funding formula must include a minimum funding guarantee (MFG) to ensure schools funding is protected year-on-year. The MFG % level will be confirmed in autumn 2025.
- The 2025/26 schools budget support grant (SBSG) and the National Insurance contributions (NICs) grant will be rolled into the NFF for 2026/27. For these two grants, the funding will be rolled in following a similar approach to previous grants:
 - adding cash amounts to the primary, key stage 3 and key stage 4 per pupil funding factors in the schools NFF, to represent the equivalent amounts in the grants
 - adding cash amounts to the primary and secondary FSM6 factors, and the lump sum, in the schools NFF, to represent the equivalent amounts in the grants
 - adding cash amounts to the MPPLs for primary, key stage 3 and key stage 4 respectively, to reflect the average per pupil amount of funding that schools attracted through the preceding grants

- adding an amount representing the total funding each school received through the preceding grants on to its baseline, which is used to calculate funding protection for the schools through the funding floor
- 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:

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

- The table below shows the amounts that will be added to the MPPLs values in the 2026/27 NFF in respect of the grants:

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

High Needs Block

11. Details on the high needs NFF for 2026/27 have not been released and will be published alongside the NFF allocations in the autumn.
14. Local authorities will again be able to transfer up to 0.5% of their total schools' block allocations to other blocks of the Dedicated Schools Grant (DSG), with schools' forum approval. A disapplication will continue to be required for transfers above 0.5%, or for any amount without schools' forum approval.

Central Schools Services Block

15. The central school services block (CSSB) will continue to provide funding for local authorities to carry out central functions on behalf of maintained schools and academies. However, the historic commitments element of the funding has been reduced each year by 20% with this expected to continue in

2026/27 to reflect the expectation that commitments entered by local authorities prior to 2013/14 will begin to unwind and reduce over time. The impact of this funding reduction for Barnsley has not yet been confirmed for 2026/27. The Council would be exploring options for containing this impact across the central DSG budgets.

Consulting on the changes to the local formula

16. The funding guidance places responsibility on local authorities to consult with their Schools Forum and respective schools / academies about any proposed changes to the local funding formula including the principles adopted and any movement of funds between blocks.
17. The Council has in the past 7 years implemented a policy of greater alignment to the NFF, with changes implemented in 2023/24 resulting in almost full alignment (with the exception of the FSM factor).
18. The recent drive by the DfE to move to the hard formula over the medium term has further restricted flexibilities in local authorities formulae. The following highlight areas or funding factors within Barnsley's local formula where further alignment would be considered (which would inform the consultation with schools):
 1. Funding for pupils with additional needs: - The NFF reflects the Government's policy of supporting schools with pupils with additional needs. In 2026/27 BMBC will plan to move closer to the NFF value for the FSM factor.

Consulting on the proposed transfer from the schools' block

19. The schools block will again be ring-fenced in 2026/27, but local authorities may transfer up to 0.5% of their schools block funding into another block, with the approval of their schools forum.
20. The Council's intention is to consult with schools and the Forum on exercising this flexibility in 2026/27, in line with the DSG Management Plan, which informed the signed Safety Valve Agreement with the DfE. The transferred funding continues to be used to part fund the revenue impact of developing additional local SEND places to reduce the reliance on out of authority placements (in independent non-maintained special schools).

Timetable

21. The following table outlines planned activities leading up to the setting/issuing of schools budgets:

Date	Activity	Action
Autumn TBC	Draft APT issued to local authorities for 2025/26. TBC if this will be issued.	ESFA
Autumn TBC	NFF arrangements for 2026-27 to be published (including illustrative funding allocations)	ESFA
Nov 2025	Submission of the high needs place notification pro-forma 2026-27 to DfE	BMBC
17 Nov 2025	Deadline for submitting disapplication requests if the local authority wishes to move more than 0.5% of the schools block	BMBC
9 Dec 2025	School funding settlement / arrangements (26/27) reported to the School Forum meeting	BMBC
9 Dec 2025	School Forum meeting to consider outcome of the consultation and agree proposed LA changes to the local funding formula	BMBC
Dec 2025	Final APT issued to local authorities, containing October 2025 census data	ESFA
Dec 2025	Publication of confirmed 2026-27 DSG allocations (including provisional high needs allocations)	ESFA
22 Jan 2025	Schools forum consultation and political approval required for final 2026-27 funding formula	BMBC
21 Jan 2026	Deadline for submission of final 2026 to 2027 APT to ESFA	BMBC
27 Feb 2026	Deadline for confirmation of schools budget shares to mainstream maintained schools.	BMBC