



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

Agenda

BARNSLEY SCHOOLS FORUM

Date: Thursday, 18th December 2025
Time: 14.00 to 16.00
Location: Barnsley Town Hall, Room 1

Ref	Item	Papers	Officer
1	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 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 23rd October 2025	ENC A	Chair
4	Schools Funding Settlement and Arrangements for 2026/27	ENC B	Helen Perrin
5	Outcome of the Local Authority's consultation with schools on proposed changes to the Local Schools Funding Formula	ENC C	Helen Perrin
6	Proposal to Transfer Funding from the Schools Block to High Needs Block	ENC D	Helen Perrin
7	Any other urgent business 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	Time	Venue	Deadline for papers
22nd January 2026	2:00- 4:00PM	Town Hall- Reception Room	9th January 2026
17th March 2026	2:00- 4:00PM	Westgate Boardroom	27th February 2026
16th July 2026	2:00 - 4:00PM	Westgate Boardroom	3rd July 2026
22nd October 2026	2:00 - 4:00PM	Westgate Boardroom	9th October 2026
17th December 2026	2:00 - 4:00PM	Westgate Boardroom	4th December 2026
21st January 2027	2:00 - 4:00PM	Westgate Boardroom	8th January 2027
18th March 2027	2:00 - 4:00PM	Westgate Boardroom	5th March 2027



Barnsley Metropolitan Borough Council Children's Services Directorate

BARNSLEY SCHOOLS FORUM

**MINUTES OF THE MEETING OF THE FORUM HELD ON THURSDAY
23rd October 2025**

MEETING ATTENDANCE

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

Councillors		
Cllr Deborah Pearson (DP)	Councillor (BMBC)	Apologies
Cllr Ken Richardson (KR)	Councillor (BMBC)	✓
Cllr Janine Moyes (JM)	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	Apologies
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		
Melanie Szoke (MS)	Childcare Quality & Sufficiency Manager	✓

Secondary School (LA)		
Paul Crook (PC)	Secondary Headteacher	Apologies
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	Apologies

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 received from Helen Perrin, Anna Turner, Councillor Deborah Pearson, Katie Adamski, Tom Smith, Jackie Milliner and Paul Crook.

Due to a change in role, Councillor Peace would no longer be a member of the Schools Forum. Councillor Deborah Pearson would replace him moving forward.

2. DECLARATIONS OF INTEREST

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

3. MINUTES AND ACTION LOG OF THE PREVIOUS MEETING OF THE SCHOOLS FORUM

The minutes of the meeting of the Forum held on the 17th July 2025 were agreed and approved as a correct record. All actions were marked as complete. No other matters arose during consideration of the minutes.

AGENDA ITEMS FOR DECISION:

4. Annual Report of the Barnsley Schools Forum (2024/25) and Local Guide

Peter Bell presented the annual report, summarising key points, including the Local Guide to the Schools Forum, which was available on the BMBC website and explained the Forum's roles, constitution, and Terms of Reference.

The report covered the main issues considered in the previous financial year, which were: school and early years budgets, high needs block funding, the safety valve intervention programme, provision for children with special educational needs, consultation on funding formula changes, and statutory commitments (admissions, welfare, school meals, pensions, teaching cover).

Performance and critical success factors for 2024/25 were discussed. Whilst the Forum did not have direct performance targets it did contribute to local authority outcomes. Areas not meeting targets included: early years Ofsted ratings and school attendance, but improvements were expected with new providers and initiatives.

The "Every Child in School Every Day" initiative was showing positive impact, with rising attendance figures. A slight dip in attendance during Quarter 4 was noted, attributed to the traditional period of family holidays. Specifically, secondary schools were 0.8% below the national target, and primary schools were 0.2% below national figures. Despite this, the local authority remained on track to meet attendance targets over the next 12 months.

Regarding school suspensions, some data was currently unavailable. However, with recent approval from schools and academies, the local authority now had access to the DfE's attendance system, enabling quicker response to emerging trends.

The remainder of the report outlined the Schools Forum's forward plan for 2025–26, including meeting dates, agenda items, venues, and submission deadlines.

Mel Szoko clarified that the latest (unpublished) Ofsted data showed that the early years target had now been met, but the report reflected the previous academic year. Nina Sleight confirmed the data was accurate for the period covered within the report, and that improvements had been made in the current year.

Simon Tabbner requested that suspension data be split between primary and secondary schools for clarity, which was supported by others.

A typo on page 6 was noted for correction.

ACTIONS:

- Peter Bell to amend the Annual report of the Schools Forum to separate suspension data by primary and secondary schools.
- Peter Bell to correct the typo on page 6 of the Annual Report of the Schools Forum.

RESOLVED 1:

The annual report was approved with the following amendments: split suspension data by primary/secondary and correct the typo on page 6.

AGENDA ITEMS FOR INFORMATION:

5. Schools Budget: Latest Forecast Position (Quarter 2: 2025/26)

Kat Knowles provided an overview of the DSG budget for 2025/26, totaling £123.6 million and split between delegated and central/retained elements, excluding academies and certain grants. Maintained schools managed £65.3 million, with a £3 million carry-forward from 2024/25.

Six primary schools were forecasting deficits totaling approximately £237,000. Ongoing work and additional meetings were planned to support these schools in managing and reducing their deficits.

The central/retained budget managed by the council was £58.3 million, with a forecast overspend of £6.6 million, due mainly to high needs block pressures, increased placements in special settings, and delays in creating new places, leading to reliance on out-of-borough settings.

The council was working to increase commissioned places locally and bring the budget back into balance, with continued risks if demand increased or new places were not secured.

Simon Tabbner raised that the deficit commentary should reflect that not all affected schools are small; geographic and demographic factors also played a role. Kat Knowles agreed to update the commentary accordingly and reflect this in future reports.

Victoria Harrison asked about the significant swing in Sacred Heart Primary's budget position, from a surplus to a predicted deficit, and whether support was in place. Kat Knowles and Peter Bell confirmed close engagement and support, with savings identified across the Corpus Christi (Catholic) Federation and expectations that the deficit would reduce.

Visseh Pejhan Sykes raised a query regarding the financial sustainability of schools and the working group referenced in the report. Katharine Knowles responded, explaining that internal discussions had begun, within the Council to explore strategic support for schools projecting deficits. Initial steps involved understanding individual school circumstances, followed by identifying potential collective actions.

Josh Greaves queried the large swing in Penistone Grammar's forecast, seeking assurance that risks were being managed at a macro level. Kat Knowles and Nina Sleight explained that significant changes were examined for accuracy and underlying pressures, and a financial governance audit programme was in place for assurance.

ACTIONS:

- Kat Knowles/Helen Perrin to update the deficit commentary to reflect geographic and demographic factors, not just school size.
- Kat Knowles/Helen Perrin and team to continue close engagement and support for schools with significant budget swings, including Sacred Heart Primary and Penistone Grammar.
- Kat Knowles/Helen Perrin to correct any table header typos and ensure clarity in future reports.

RESOLVED 2: The Forum noted the latest budget forecast and the ongoing work to support schools with deficits and manage high needs block pressures.

6. Schools Funding Settlement and Arrangements for 2026/27

Kat Knowles explained that, similar to last year, the Department for Education (DfE) would not provide provisional funding settlement figures until after the Autumn budget, delaying the usual timeline for budget modeling and consultation.

The Forum was informed that key dates for the publication of National Funding Formula (NFF) arrangements were expected in the autumn, with consultation and Forum meetings planned for December, and final formula approval required by January, followed by budget confirmation in February.

It was noted that the December meeting date had been changed to accommodate the delayed funding announcement and allow time for necessary work to be completed.

ACTIONS:

- Kat Knowles/Helen Perrin to monitor DfE guidance and provide updates to the Forum as soon as settlement figures are released.

RESOLVED 3: The Forum noted the update on the funding settlement timeline and agreed to the revised meeting schedule to align with DfE announcements.

CONFIDENTIAL AGENDA ITEMS:

7. Special Educational Needs Performance and Finance Report (Quarter 1: 2025/26)

Sue Day reported that the anticipated White Paper, originally expected to be published in autumn 2025, had now been delayed until spring 2026, as confirmed by recent notification. She added that there was continued growth in the number of children with Education, Health and Care Plans (EHCPs), which was driving increased financial pressure on the high needs block. Despite this, Barnsley Council had invested in additional capacity to maintain service levels.

Barnsley remained above national performance benchmarks for SEN provision, with additional resource provision secured in all primary settings and ongoing work to expand capacity in secondary.

The EHC team had been remodeled, with a particular focus on exclusions and suspensions for children with SEN, noting a mixed picture across primary and secondary phases.

The number of children placed out of borough in the first term was significant, adding further pressure to the high needs budget. Efforts were ongoing to secure more in-borough placements and use funding more flexibly.

Josh Greaves asked about the average cost and number of independent providers for placements. Sue Day estimated the average cost at £95,000 per

child placed out-of borough, plus transport and tribunal costs, and agreed to provide a breakdown of providers at a future meeting.

Nina Sleight highlighted two key areas of work: strengthening sufficiency plans (including new provision and oversight groups) and exploring ways to reinvest out-of-borough funding into local provision through collaborative workshops with school leaders. The DfE's Free School Programme remained paused, impacting plans for additional special school places. In response, the local authority had strengthened its sufficiency planning, including the establishment of an internal SEND and Alternative Provision (AP) Sufficiency Oversight Group. This group was closely monitoring progress and working to secure additional in-borough places, with oversight from senior leadership and reporting through the Safety Valve Programme. Barnsley continued to receive DfE payments in recognition of its efforts, unlike some other local authorities which faced escalating concerns.

Work was underway to explore how funding currently spent on out-of-borough placements could be redirected to support in-borough provision. Workshops had been held with primary and secondary leaders to co-produce proposals aimed at unlocking this funding creatively and collaboratively.

Sue Day reported that a small group of primary schools were developing proposals, with a presentation to secondary schools planned by January 2026. These proposals would undergo a due diligence process before being brought to the Forum in January 2026. She also referenced ongoing work around capital estate planning and expressions of interest from schools, including a specific example involving Penistone St. John's Primary School.

ACTIONS:

- Sue Day and Nina Sleight to present co-produced proposals in January 2026, focused on redirecting funding from out-of-borough placements to support in-borough provision. Lauren Firth to add to forward plan.
- Sue Day to follow up on the potential use of existing school space for SEN provision as part of the capital estate review.

RESOLVED 4:

The Forum noted the SEN performance and finance report, ongoing sufficiency planning, and the commitment to bring further proposals for in-borough provision and funding arrangements to a future meeting.

8. ANY OTHER URGENT BUSINESS

No urgent business was raised.

9. SCHEDULE OF FUTURE MEETINGS (2025/2026)

The following meeting dates were noted:

- Thursday 18th December 2025 - 2.00pm – Room 1, Barnsley Town Hall
- Thursday 22nd January 2026 - 2.00pm – Reception Room, Town Hall
- Tuesday 17th March 2026 – 2.00pm – Boardroom, Westgate Plaza

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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 18th December 2025

REF	DATE	ACTION	LEAD	UPDATE	STATUS
12	18.12.2025	<p><u>Outcome of the Local Authority's consultation with schools on proposed changes to the Local Schools Funding Formula</u></p> <p>BMBC to consider the use of workshops or cluster meetings to improve future consultation engagement, with a review of effectiveness for next year.</p>	BMBC Colleagues		New Action

ONGOING ACTIONS

REF	DATE	ACTION	LEAD	UPDATE	STATUS
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	Will be actioned when we complete the Q3 outturn report which will be presented at school forum in January.	Ongoing
8	23.10.2025	<p><u>Schools Budget: Latest Forecast Position (Quarter 2: 2025/26)</u></p>	KK/HP	Will be actioned when we complete the Q3 outturn report which will be presented at school forum in January.	Ongoing

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		Kat/Helen to correct any table header typos and ensure clarity in future reports.			
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	SD to give a verbal update to the forum on the process that is being followed for capital.	Ongoing

COMPLETED ACTIONS (To be deleted after each meeting)

REF	DATE	ACTION	LEAD	UPDATE	STATUS
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
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	To be presented as part of the Schools Funding Settlement and arrangements for 2026/27 report. To be shared at the meeting on 18.12.2025	Complete
4	23.10.2025	<p><u>Annual Report of the Barnsley Schools Forum (2024/25) and Local Guide</u></p>	PB	09/12/25 – Peter shared the updated report, LF circulated to members.	Complete

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		<u>Peter to amend the Annual report of the Schools Forum to separate suspension data by primary and secondary schools.</u>			
5	23.10.2025	<u>Annual Report of the Barnsley Schools Forum (2024/25) and Local Guide</u> <u>Peter to correct the typo on page 6 of the Annual Report of the Schools Forum.</u>	PB	09/12/25 – Peter shared the updated report, LF circulated to members.	Complete
7	23.10.2025	<u>Schools Budget: Latest Forecast Position (Quarter 2: 2025/26)</u> Kat/Helen and team to continue close engagement and support for schools with significant budget swings, including Sacred Heart Primary and Penniston Grammar.	KK/HP	HP confirmed they are closely monitoring schools' position and arranging meetings with those schools who are seeing an increase in their deficit or moving to a very low surplus balance. They are also challenging schools on why their balances have changed and asking for explanations. Action closed, ongoing work	Complete



Barnsley Metropolitan Borough Council
People Directorate

Schools Forum Agenda Item

Title: Schools' funding arrangements (2026/27)

Date: 18th December 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 indicative schools funding settlement for 2026/27, as recently announced by the Government and impact for Barnsley.**
 - **Note the key changes in the funding arrangements for school for 2026/27, which would inform the basis of the schools funding formula.**

Schools Funding Settlement

3. The Government in **November 2025** confirmed detailed aspects of schools funding arrangements for 2026/27, with total provisional funding for mainstream schools through the schools NFF totalling £50.9 billion. This includes funding that was allocated in 2025/26 through the schools budget support grant (SBSG) and National Insurance contributions (NICs) grant, which has been rolled in to schools NFF in 2026/27.
4. Details on the allocations of high needs funding for 2026/27 will be published at a later date.
5. On 20th November 2025, the Government published the NFF provisional allocations for schools, and central school services for 2026/27 and the NFF

policy and guidance document. The table below compares the provisional allocations for 2026/27 to the current year:

	2025-26 Baseline £M	2026-27 Provisional £M	Change £M
Schools Block	218.095	228.407	+10.312
Central Schools Services	1.673	1.821	+0.148
	219.768	230.228	10.460

**schools block funding for 26/27 excludes growth factor funding (tbc) but growth funding is included in 25/26*

***2025/26 school Block and Central Block baseline doesn't include £5.5M SBSG, and NICs Grant*

6. The increase in Barnsley's funding (£10.5M) equates to 4.8% (compared to 2025/26).

- Funding through the NFF is increasing by 2.1% per pupil on average in 2026/27 compared to 2025/26 (excluding the rolled in 25/26 grant funding).
- The 2025/26 schools budget support grant (SBSG) and National Insurance contributions (NICs) grant have been rolled into the schools NFF (included in the provisional 2026/27 allocation figures in the table above), ensuring that this additional funding forms part of the schools core budgets.
- The funding for teachers' pay has been converted to a full year equivalent, so that it will support the costs of the 2025 teachers pay award across the whole 2026/27 funding year.

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 funding guidance in November 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. The NFF factor values for 2026/27 are attached in **annex 1**.
- The core factors in the schools NFF (such as the basic entitlement, additional needs factors and lump sum) will increase by on average 2.1%.
- The minimum per pupil funding levels (MPPL) will be set at £5,115 for primary schools and £6,640 for secondary schools. This is a mandatory factor in local authorities schools' formulae.
- The funding floor will be "cash flat" at 0% so that schools will be protected from per pupil cash reductions in their pupil led funding.
- Local authorities funding formula must include a minimum funding guarantee (MFG) to ensure schools funding is protected year-on-year. Local authorities will have the freedom to set the MFG in local formulae between -0.0% and +0.0% per pupil.
- 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 by 20% in 2026/27 to reflect the expectation that commitments entered by LAs prior to 2013/14 will begin to unwind and reduce over time. The impact of this funding reduction for Barnsley in 2026/27 is £46k – 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.	DFE
Autumn TBC	NFF arrangements for 2026-27 to be published (including illustrative funding allocations)	DFE

5 Dec 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	DFE
Dec 2025	Publication of confirmed 2026-27 DSG allocations (including provisional high needs allocations)	DFE
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 DFE	BMBC
27 Feb 2026	Deadline for confirmation of schools budget shares to mainstream maintained schools.	BMBC

Annex 1 - NFF Factor Values for 2026/27

	2026/27 NFF	2025/26 BARNSLEY
	£	£
1) Age Weighted Pupil Unit (AWPU)	Unit	Unit
AWPU (Primary)	£4,064	£3,847
AWPU (KS3)	£5,686	£5,422
AWPU (KS4)	£6,410	£6,113
2) Minimum per pupil		
Minimum per pupil funding Secondary	£6,640	£6,465
Minimum per pupil funding Primary	£5,115	£4,955
3) Deprivation		
FSM P	£505	£346
FSM S	£505	£346
Free School Meals (P) (FSM6)	£1,210	£1,034
Free School Meals (S) (FSM6)	£1,725	£1,516
IDACI F (P1)	£240	£235
IDACI E (P2)	£290	£285
IDACI D (P3)	£455	£445
IDACI C (P4)	£500	£485
IDACI B (P5)	£530	£515
IDACI A (P6)	£700	£680
IDACI F (S1)	£345	£340
IDACI E (S2)	£460	£450
IDACI D (S3)	£650	£635
IDACI C (S4)	£710	£690
IDACI B (S5)	£760	£740
IDACI A (S6)	£970	£945
4) English as an Additional Language		
EAL (P)	£610	£595
EAL (S)	£1,630	£1,595
5) Mobility		
Mobility (P)	£985	£965
Mobility (S)	£1,415	£1,385
6) Prior Attainment		
Low Attainment (P)	£1,200	£1,175
Low Attainment (S)	£1,825	£1,785
7) Lump Sum		
Lump Sum (P)	£152,700	£145,000
Lump Sum (S)	£152,700	£145,000
8) Sparsity		
Sparsity (P)	£58,600	£57,400
Sparsity (S)	£85,200	£83,400
9) Premises factors (rates, PFI, etc)		
10) Split sites		
basic eligibility funding	£55,100	£54,000
distance funding	£27,600	£27,000



Barnsley Metropolitan Borough Council
People Directorate

Schools Forum

Agenda Item ()

Title: Outcome of the consultation on changes to schools funding 2026/27

Date: 18th December 2025

Author: Helen Perrin (Principal Account)

PURPOSE OF REPORT

1. To inform the Forum of the outcome of the consultation on changes to the schools funding formula for 2026/27 following the publication of the DfE summary policy document that sets out the structure of the schools national funding formula (NFF) for 2026/27. Due to the timing of the 2025 spending review, no indicative allocations or NFF factor rates were available to be shared within the consultation document.

RECOMMENDATIONS

2. It is recommended that the Forum:
 - **Note the responses from schools to the consultation on changes to the formula and the Authority's indicative position / response to the key consultation issues.**

INTRODUCTION

3. The consultation document issued to schools sets out the proposed changes to Barnsley's local formula to further the objective of a full alignment to the Government's national funding formula (NFF). These proposals build on the changes made in 2025/26 and previous years.
4. The consultation sought views on Barnsley's proposed 2026/27 schools funding formula and in particular changes to the FSM funding factor as this is the only funding factor within Barnsley's local formula that does not match the NFF funding factor. The consultation document provided information to schools on the changes to funding factors used in the formula and our approach to continue to closely mirror the NFF. This report summarises, on a question-by-question basis, the responses received from schools and the Council's views and proposed action (informed by the responses received).

ANALYSIS OF RESPONSES FROM SCHOOLS

5. In total 48 schools (out of 88 schools) responded to the consultation on the changes to schools funding. This represents a 55% response rate, which is an increase in responses when compared to the 2025/26 consultation which saw a 22% response. The increase in responses is as a result of more primary schools engaging with the school's consultation. See table below for a breakdown:

	No. of schools	No. of Responses	% responses
Secondary	11	5	45%
Primary	77	43	56%
	88	48	55%

6. The number of responses (and percentages) have been adjusted to take account of multiple and identical responses from Multi Academy Trusts or schools clusters. In such cases the responses have been counted as per the number of schools within the cluster or MAT.

Q1: Do you support the phased approach to aligning the FSM unit value to the NFF?

	Primary	Secondary	Total	Percentage
Agree	41	3	44	92%
Disagree	2	1	3	6%
Not sure	0	0	0	0%
Not answered	0	1	1	2%
	43	5	48	100%

7. The majority of responses (92%) agreed with the proposal for the phased approach to aligning the FSM unit value to the NFF. Comments received felt strongly that the FSM rate should be in line with the NFF value in 2026/27 and was currently not closely aligned enough. The reason for the "not answered" response was due to no financial data being available to show the impact for schools, on the approach of aligning the FSM factor.

Q2: Do you support the intention to mirror, or align as closely as possible, to the National Funding Formula (NFF) values?

	Primary	Secondary	Total	Percentage
Agree	43	5	48	100%
Disagree	0	0	0	0%
Not sure	0	0	0	0%
Not answered	0	0	0	0%
	43	5	48	100%

8. All responses received agreed with the proposal to mirror or align as closely as possible, to the National Funding Formula (NFF) values. Schools felt that keeping things as closely aligned as possible to the NFF helps schools to understand what funding to expect year on year, which helps with long term planning.

Q3: Do you support the proposal to continue to set the minimum guarantee (MFG) within the local funding formula for 2026/27 in line with the maximum protection allowed by DfE?

	Primary	Secondary	Total	Percentage
Agree	42	5	47	98%
Disagree	0	0	0	0%
Not sure	0	0	0	0%
Not answered	1	0	1	2%
	43	5	48	100%

9. The majority of responses received agreed with the proposal to continue to set the minimum guarantee (MFG) within the local funding formula in line with the maximum protection allowed by DfE. At the time of releasing the schools consultation, DfE had not confirmed the MFG value. DfE have now confirmed MFG will be set between -0.5% and +0% (the same as 2025/26).

Q4: Do you support the principle of capping and scaling funding gains to achieve a more equitable distribution of gains across schools?

	Primary	Secondary	Total	Percentage
Agree	35	4	39	81%
Disagree	7	1	8	17%
Not sure	0	0	0	0%
Not answered	1	0	1	2%
	43	5	48	100%

10. The majority of responses received agreed (81%) with the principal of capping and scaling with 17% disagreeing. Those that agreed supported it if it was required to achieve the MFG requirement. Those that did not agree felt that if capping was applied then the NFF was not being followed and if funding gains are achieved in schools it is because funding is intended for those pupils.

BMBC RESPONSE AND PROPOSED FORMULA CHANGES

11. The aim of the proposed changes is to deliver on the Government's expectation that local school's formulae are fully aligned to the NFF; set a formula that maximises pupil-led funding; and directs funding to schools as expected under the NFF. Stability would be maintained through the minimum funding guarantee, so that schools are not disadvantaged in the process.

Deprivation Factor – FSM

12. It is proposed to increase the FSM proxy indicator (introduced in 2022/23), to ensure further alignment to the NFF and meet the requirement to move factor values at least 10% closer to the NFF. It is therefore proposed to increase the FSM proxy indicator unit value to the minimum NFF value of £381 (dependent on affordability) per FSM pupil compared to the NFF value of £505. Increases will continue to be implemented in future years to ensure a phased approach to full NFF alignment.

Minimum Funding Guarantee (MFG)

13. The MFG, applied at a per-pupil funding level, protects schools from significant year on year formula changes (apart from pupil data changes). It is set by local authorities within a range determined by the Government. The Government has confirmed that the Minimum Funding Guarantee (MFG) allowable range will be set between **-0.5% and +0%** per pupil. An MFG of 0% (maximum protection allowable) was applied in 2025/26. It is proposed to continue this approach in 2026/27 to replicate the funding floor within the National Funding Formula (NFF) and safeguard schools against losses during a period of tight budgets.

Principal of capping and scaling funding gains

14. The guidance allows Local Authorities to cap or scale back funding gains to schools arising from formula changes on the grounds of affordability and to achieve a more equitable distribution of gains. No capping of gains was applied in the 2025/26 Schools funding formula although scaling was implemented (consistently for all schools) to meet the 0% MFG requirement. It is proposed in 2026/27 to continue with the process of no capping of gains and only applying scaling in order to meet the 0% MFG requirement.



Barnsley Metropolitan Borough Council
People Directorate

Schools Forum

Agenda Item

Title: Outcome of the consultation on funding transfer to the high needs block 2026/27

Date: 18th December 2025

Author: Helen Perrin (Principal Accountant)

Purpose of the report

1. To outline for the Forum the financial sustainability issue faced in the high needs block over the medium term and the approach / plan being adopted by the Council to address the issue. Key element of the financial plan is the proposal to increase the funding transfer from the schools block to the high needs block.
2. This report seeks approval for the funding transfer proposal for 2026/27 within the context of the responses received from schools following the consultation.

Recommendations

3. It is recommended that the Forum:
 - **Note and consider the responses from schools to the consultation on the proposed 1% funding transfer from the schools to the high needs block;**
 - **Approve the proposal of the Council to implement a 1% funding transfer (£1.7M) from schools block to the high needs block for 2026/27. This needs to be considered in the context of the Council's DSG Management Plan / Safety Valve Agreement with the DfE put in place to manage the deficit over the medium term.**

Funding transfer to the high needs block

4. In 2020/21 the council implemented a funding transfer of 0.5% (£0.8M), this was increased to 1% (£1.6M) in 2021/22, 1% (£1.7M) in 2022/23, 1% (£1.8M) in 2023/24, 1% (£2.0M) in 2024/25 with a further 1% (£1.7M) agreed in 2025/26, all following approval from the DfE. It is the intention of the Council to consult with schools and the Schools Forum on the proposal to transfer 1% of the schools' block funding to the high needs block in 2026/27. If we assume a similar resource envelope as 2025/26 this will be c£1.7M.

5. The funding transfer from schools would be invested in meeting the in-year revenue cost of creating / developing new SEND places and provision in mainstream schools to help stem placements in independent settings. This provides much needed space for planned savings to be realised from implemented actions to reduce the in-year deficits in future years.

Current budget pressures

6. The context of Barnsley's SEND/high needs budget, similar to many other local areas, is one of rising demand, financial pressures and an increasing accumulated budget deficit.
7. Under current regulations, accumulated high needs deficits can be ring-fenced from councils' wider financial position in their statutory accounts and carried forward from one year to another. In June 2025 the DfE announced that it will extend the Dedicated Schools Grant Statutory Override (ring-fence) until the end of 2027/28, at which point LAs will need to demonstrate their ability to cover DSG deficits from their future available reserves. Prior to the extension announcement the regulation was due to cease in March 2026. This extension will form part of a phased transition process where the government will work with Local Authorities to manage their SEND system including deficits.
8. A cumulative DSG deficit of £17.9M is currently projected by the end of 2025/26 financial year comprised of the cumulative £13.9M deficit carried forward from 2024/25 (inclusive of the £14.6M DfE support funding received to date under the Safety Valve Programme) and the above forecast in-year deficit of £6.6M currently projected (Q2) for 2025/26 year offset by the 2025/26 safety valve payment of £2.75M (£13.9M + £6.6M - £2.75M). The recurring annual deficit in the high needs budget can be attributed to the following:

Funding Pressures

- The high needs funding over the years has not kept pace with the growth in SEND numbers (and demand for support) in Barnsley.

Cost Pressures

- Continued increase in the number (and associated cost) of pupils and learners with complex needs requiring specialist support.
- Continued placements in independent non-maintained specialist schools, which are more costly and expensive.
- Challenging economic landscape with cost-of-living pressures and rising inflation, linked to an increase in inflation and fee rate requests over and above planned uplifts.
- Increase number of placements directed following tribunal appeals.

Demand challenges

9. Barnsley continues to face demand challenges in relation to the number of children and young people supported through SEN Support in schools; those with an EHCP;

and those placed in specialist settings – both locally and externally. The following reflect the SEND position in Barnsley (as at end of September 2025):

- 3,236 children with a EHCP maintained by Barnsley (compared to 2,943 in September 2024).
 - Of this 74.0% access a provision in Barnsley and 16.6% access out of authority provision (the remaining % being EHE, EOTAS, NEET or under consultation).
 - Recent published data by the Government indicate that the total number of EHCPs has continued to increase nationally.
 - This national trend is mirrored in Barnsley, where the number of children with an EHCP has risen although this increase is below that seen nationally.
 - Between January 2024 and January 2025 Barnsley saw a 10.6% increase in new EHCPs in comparison to 10.8% nationally. This is below the regional increase of 12.1%.
 - The increasing number of pupils with Education, Health & Care Plans (EHCPs) requiring specialist support and placements in independent & non-maintained special schools continue to exert pressures on the high needs budget.
10. Although the Council has created additional specialist places and resourced provision places within the borough demand challenges continue to exist in meeting the complex needs of certain pupils locally in Barnsley.
11. These demand challenges and related budget pressures are being addressed over the medium term through the implemented actions within the Council's DSG management plan and Safety Valve Programme (as agreed with the DfE).
12. Looking ahead, our forecasting shows demand for support for children and young people with SEND and for those with EHCPs continues to increase. If unmitigated, the cumulative DSG deficit will continue to rise.

Addressing the Demand / financial challenges

13. The SEND Improvement Plan (together with the SEND Sufficiency Strategy) continues to contribute and drive the DSG Management Plan and the Safety Valve Agreement, which is the framework put in place for managing the pressures and challenges within the SEND system.
14. The DSG management plan sets out the financial pressures in SEND and the measures or actions to be implemented to bring the spend back into balance over the medium term to 2026/27. Whilst the Safety Valve Programme targets those local authorities with the highest DSG deficits and offers financial support to LAs in managing their high needs systems sustainably.
15. The Council, in March 2023, agreed to enter into a Safety Valve agreement with the DfE. Under this agreement, the DfE has committed to paying the council £22.9 million over five years to 2026/27. This funding will be provided in instalments and is subject to continued satisfactory progress (via quarterly monitoring returns), in delivering the actions / measures set out in the DSG Management Plan as follows:

- Commission new local SEND provision and places, to ensure sufficient placements for children and young people locally, thus reducing the reliance on high cost Independent and Non-Maintained Special Schools (INMSS);
 - Continue working with parents and carers to formulate a strategy to transition pupils from INMSS to local provision, where suitable;
 - Review the effectiveness of the current notional SEND budget in schools;
 - Review the current Alternative Provision (AP) model to provide effective and efficient provision;
 - Encourage and support schools/settings and the wider SEND system to be inclusive, through early identification and increase in SEND support in mainstream schools;
 - Review the provision and accessing of the Education other than at school (EOTAS) contract, thus increasing oversight, length of time accessing the support, improved transition back into school by delivering provision in school settings and in communities, and working as a partnership with schools, settings, and stakeholders.
16. To support us with objective check and challenge and guidance for delivering on the DSG management plan and Local Area SEND Inclusion Plan, we have secured an external scrutineer. We have also strengthened our governance arrangement by transitioning the SEND Oversight Board to our Local Area Partnership Board.
17. The Council is not immune to the national pressures relating to SEND, and since entering the Safety Valve programme, and despite achieving savings targets of over £8M, the rising EHCP numbers and demand for SEND support is resulting in a forecast increase to the DSG deficit, which consequently poses financial / sustainability risks in the current year and beyond.
18. Despite this challenging landscape, the Council continues to work closely with partners to mitigate a worsening position through focused sufficiency and place targets, and increased inclusion support for schools so that where it is appropriate to do so, children can be educated in mainstream schools.
19. The Government have not yet announced the 2026/27 High Needs funding allocation, we have assumed an estimated increase of around £1.4M (3%) in our forecast plan for 2026/27.
20. Even with this additional increase in funding the impact of the challenging landscape is the current forecast position is no longer a balanced budget by the end of the safety valve programme in 2026/27. The latest Q2 update to the Safety Valve Programme projected an accumulative deficit by the end of the Safety Value programme of £21.7M.
21. The table below shows the latest summary of the DSG Plan forecast net deficit position, reflecting planned actions and savings (as per the latest Q2 position which will be submitted to the DfE Safety Valve programme in December):

DSG Management Plan	Actual			Forecast	
	2022/23 £'000	2023/24 £'000	2024/25 £'000	2025/26 £'000	2026/27 £'000
Total HNB Funding	36,205	40,060	43,093	45,654	47,416
Block Transfer (1%)	1,786	1,877	2,010	1,735	1,735
HNB Spend before savings	43,675	49,511	55,389	62,913	70,562
Total savings	-1,825	-4,266	-6,793	-8,953	-11,968
HNB Spend after savings	41,850	45,245	48,596	53,960	58,594
Subtotal Deficit (+) / Surplus (-)	3,859	3,308	3,493	6,571	9,443
Accumulative Deficit	21,804	25,112	28,605	35,176	44,619
Safety Valve payment	9,160	3,750	1,750	2,750	5,500
Retained Deficit	12,644	12,202	13,945	17,766	21,709

Impact on schools of a 1% funding transfer

22. The Safety Valve Agreement signed and entered with the DfE includes a 1% funding transfer requirement from the schools block to the high needs budget (see table above) and underpins the financial plan to get the high needs to a sustainable position by 2026/27. Nonetheless, the requirement to review this block transfer and to consult annually with schools still remains.
23. Due to the timing of the release of the provisional 2025/26 allocations and the decision by DfE not to provide a modelling tool, we have been unable to produce a modelled impact on schools of the proposed 1% funding transfer (£1.7M).
24. The funding transfer from schools would be invested in meeting the in-year revenue cost of creating new SEND places to help stem placements in independent settings.

Outcome of the consultation with schools

25. The following section sets out and summarises the responses received from schools on the consulted question relating to the high needs funding transfer proposal.

Q3: Do you support the proposal to transfer 1% from the schools' block to the high needs block for 2026/27 and for this to be applied to meet the cost of placing SEND pupils in new commissioned local SEND places?

	Primary	Secondary	Total	Percentage
Agree	31	1	32	67%
Disagree	9	4	13	27%
Not sure	0	0	0	0%
Not answered	3	0	3	6%
	43	5	48	100%

Summary of responses

26. More than half of the responses from schools (67%) are supportive of the proposal to transfer 1% of schools funding to the high needs block. Whilst the other 27% of schools do not support the proposal.

27. 72% of primary schools are in support of the proposal. Of the 5 secondary schools that responded to the consultation, 20% are in support of the funding transfer proposal.

28. The consultation also provided opportunity for schools to give narrative commentary:

1. *"I support the transfer. We're seeing higher levels of SEND need across the borough, and having a stable High Needs budget is essential if we want the right provision for our children. The impact on individual schools is manageable, but the benefits to SEND support are significant. It feels like the right thing to do for our most vulnerable pupils";*
2. *"We fully appreciate the increasing cost of SEND students, however the financial impact on the schools is equally challenging. Top slicing budgets to support SEND will only impact further on the school financially resulting in increased deficits and further cuts in school";*
3. *"Whilst in principle we support the continued transfer to the high needs block given the significant pressures around pupils with additional need, we would question if the LA is using the available resources in the most effective way – i.e. high cost of out of borough provision etc. and would want assurance that successful actions are being taken to address this";*
4. *"SEND need should be fully funded centrally by the Government";*
5. *"I would question why the proposal is set at 1% when I believe other local authorities set it at 0.5%";*
6. *"As a school with a high number of pupils joining as in year transfers and a SEND % which is now above National average, any reduction in school funding to sustain a wider LA objective would be very damaging. The current pupils in school do not require specialist provision but do need school to have sufficient funding to support their additional needs";*
7. *"I would like to see the High needs block funding better distributed to schools to allow them to meet their own legal obligations to pupils with SEND as a first priority";*
8. *"I don't agree with this transfer. 0.5% is the maximum amount the DfE say should be transferred back and even then this should not be taken as a given every year. Transferring more than the maximum every year just seems to have become the norm due to a "rising demand, financial pressures, and an increasing accumulated budget deficit". There is increasing SEND need within the schools due to this lack of places so the schools too have "rising demand, financial pressures and accumulating in-year deficits" but unfortunately we can't take money from anyone else, we just have to manage our budgets better";*
9. *"This has been requested and in place for the past 7 years, with little impact on schools. I would rather the money be distributed to schools to provide support for SEN pupils in school, which would reduce the need for commissioned local SEND places.";*

10. *“High Needs Block funding nationally is not keeping pace with rising SEND needs. Without more specialist staff, more capacity in mainstream, more early intervention ...the High Needs Block may require annual transfers, becoming an ongoing cycle rather than a sustainable fix”;*
11. *“Mainstream schools are already expected to meet the first £6,000 of SEND support. Reduced core funding could mean: Less capacity to provide high-quality universal and targeted support, fewer TAs or reduced TA hours. Less inclusion support for pupils who don't meet specialist placement thresholds. Greater pressure on teaching staff. This risks increasing the gap for pupils on SEND Support — the very group who already account for the fastest growing needs”;*
12. *“A strong High Needs strategy should include investment in mainstream inclusion, not only specialist capacity. Accountability and Value for Money- some areas of concern: Are the new commissioned places cost-effective? How will impact be measured? Will these placements reduce out-of-area costs or simply add to spending?”;*
13. *“The consultation document provides a useful update on the actions and progress that is being made”.*