NORTH YORKSHIRE SCHOOLS FORUM

Date of meeting:	Thursday 24 September 2026 (via Teams)
Title of report:	**Minutes of the North Yorkshire Schools Forum**
Type of report: Delete as required	For information only
Executive summary: Including reason for submission	The minutes of the previous meeting of the North Yorkshire Education Partnership are presented for approval.
Budget / Risk implications:	N/A
Recommendations:	The minutes are approved as an accurate record.
Voting requirements:	N/A
Appendices: To be attached	N/A
Report originator and contact details:	Andrea Mansfield- Clerk to The Schools Forum Tel: 01609 532609 E-mail: andrea.mansfield@northyorks.gov.uk
Presenting officer: If not the originator	N/A

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PRESENT:

Chair:	Alison Kaye-Academy
Primary Headteachers :	Peter Croner Ian Mottram
Secondary Headteachers:	Ian Chapman Gareth Whittaker
Nursery headteacher:	Jonelle Yeoman
Special Headteacher:	Ann-Marie Ellis
Pupil Referral Service:	Gareth Morton
Academies:	David Barber Melissa Boyes Sam Bradley Rebecca Broadbent Kate Davidson Rachel Donohue Anouska Gardner Rosie Hawkins Claire Hurworth Laura Parker–sub for Michelle Hockham (Special School) Helen Coulthard sub for- Mark McCandless Louise Sagar- Vice Chair Helen Williams Samantha Williams
Governors:	Marianne Tharby- Primary
Early Years Providers PVI:	
16-19 Providers:	
Diocesan Representatives:	
Trade Unions:	Stephen Jennings Michelle Jones

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Observers:	Cllr Annabel Wilkinson, Cllr Janet Sanderson
In Attendance:	El Mayhew Sally Dunn Howard Emmett Louise Wilson Andrea Mansfield (LSO Minute Taker),
Apologies:	Melissa Adderley (PRS) Martin Macaulay- Middlesbrough RC Diocese Simon Gummerson-16-19 provider Becki Bulmer -Secondary governor Jan Linsley Michelle Hockham (Special School)

1324: WELCOME

The Chair welcomed everyone to the meeting.

1325: MEMBERSHIP UPDATE

Circulated: A list of the current membership:

There are no vacancies 1 resignation from 31/10/2026 Michelle Hockham- Special Academy nominations will be sought.

1326: MINUTES OF THE PREVIOUS MEETING-item 1.3

AGREED: That the minutes of the meeting held on Thursday 21 May 2026 be agreed as an accurate record

1327: MATTERS ARISING

There were no matters arising.

1328: NOTIFICATION OF OTHER URGENT BUSINESS

There were no notifications of other urgent business for consideration.

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1329: EARLY YEARS FUNDING UPDATE- Item 2.1

CONSIDERED: A report considering the following areas:

- The national consultation currently being undertaken by the DfE on proposed changes to the early years entitlements funding system for the financial years 2027-28 to 2029-30.
- Notification of a principle-based consultation to be undertaken on the funding rates to be paid to early years' providers for the funded early education and childcare entitlement for early learning 2-year-olds, the working parent entitlement for under 2-year-olds, 2-year-olds, and 3 & 4-year-olds and the universal entitlement for 3 & 4-year-olds for the 2027-28 financial year.

RECOMMENDATIONS:

The North Yorkshire Schools Forum was asked:

i. To note the national early years funding consultation currently being Undertaken by DfE

ii. To note the principle-based funding consultation to be undertaken with early years' providers within North Yorkshire on the funding rates to be paid to early years' providers for the funded early years entitlement for early learning 2-year-olds, the working parent entitlement for under 2-year-olds, 2-year-olds, and 3 & 4-year-olds and the universal entitlement for 3 & 4-year-olds, and the proposed introduction of a contingency fund for the 2027-28 financial year

AGREED: The North Yorkshire Schools Forum noted and approved the contents of this paper.

1330: SCHOOL FUNDING 2027-28- Item 2.2

CONSIDERED: A report providing an update on school funding for 2027-28. The paper described the intention to consult schools and academies.

RECOMMENDATIONS:

The Schools Forum was asked:

A) To note the update on school funding.

B) To support the submission of a disapplication request to the DfE for the use, if required, of an exceptional circumstance funding formula allocation of £50,000 for very small sparse secondary schools for 2027-28.

C) To support the submission of a disapplication request to the DfE for the continued use in the 2027-28 financial year of the exceptional circumstance funding formula factor to provide funding for those schools where property rental is essential for the delivery of statutory educational provision and where the rental cost is greater than 1% of the school's delegated budget.

D) To note the intention to consult schools and academies on the potential formula implications for 2027-28 related to:

i. The level of the MFG for 2027-28 (DfE minimum or maximum threshold)

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ii. The methodology to be used to deal with any under or overspend on the 2027-28 schools' block DSG, after the application of the NFF factor values and MFG funding protection in the North Yorkshire funding formula, and the agreed repayment of any funding shortfall on the 2026-27 Schools Block DSG

iii. Proposed amendments to the notional SEN budget formula for primary schools for the 2027-28 financial year to reflect the current profile of pupils with additional SEND needs within the sector, as follows:

- To increase the percentage of the FSM6 funding allocated for notional SEN funding from 30% to 40%
- To increase the percentage of the IDACI funding allocated for notional SEN funding from 20% to 50%

E) To approve the utilisation of any unallocated 2027-28 NFF Growth Funding to fund commitments on the 2027-28 Schools Block DSG related to the 2027-28 school's budget and the agreed repayment of any funding shortfall on the 2026-27 Schools Block DSG

NOTED:

Declarations of Interest: Louise Sagar, Helen Williams, and Melissa Boyes and Ali Kaye declared interests due to their respective academy trusts and schools being in receipt of growth funding or exceptional rent funding.

Members sought clarification on the implications of proposed changes to notional SEN funding. It was confirmed that there would be no immediate financial impact on schools, although future DfE proposals may result in mainstream, inclusion and notional SEN funding being combined into a single funding stream.

Members also discussed the treatment of LGPS savings and were advised that there is no mechanism to redistribute funding between schools to reflect differing levels of pension savings. It was noted that the reduction in employer contribution rates reflects a pension valuation adjustment rather than new funding being provided to schools.

In response to a query regarding increasing Free School Meal eligibility, members were advised that the DfE intends to incorporate the additional funding requirements within the 2027-28 funding formula, mitigating the risk of a DSG shortfall arising from the policy change.

AGREED:

Prior to consideration of recommendations (b), (c) and (e), **Louise Sagar, Helen Williams and Melissa Boyes** declared interests as their respective academy trusts/schools received growth funding or exceptional rent funding. In accordance with Schools Forum procedures, they took no part in the decision-making on these items and were excluded from the vote.

The Schools Forum had **23 voting members present**, of whom **20 were eligible to vote** on recommendations (b), (c) and (e).

The Chair asked members to indicate if they had any objections to recommendations (b), (c) and (e). No objections were raised by any eligible voting member.

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On that basis, the Chair confirmed that there was unanimous support from the **20 eligible voting members** for:

- the submission of a disapplication request to the DfE for the use, if required, of an exceptional circumstance funding formula allocation of £50,000 for very small sparse secondary schools for 2027-28;
- the submission of a disapplication request to the DfE for the continued use of the exceptional circumstance funding formula factor for qualifying property rental costs in 2027-28; and
- the utilisation of any unallocated 2027-28 NFF Growth Funding to fund commitments on the 2027-28 Schools Block DSG related to the 2027-28 schools budget and the agreed repayment of any funding shortfall on the 2026-27 Schools Block DSG.

The Schools Forum also:

- **Noted** recommendations (a) and (d); and
- **Supported/approved** recommendations (b), (c) and (e) unanimously, with **20 votes in favour, 0 against and 0 abstentions** from those members eligible to vote.

1331: PUPIL GROWTH FALLING ROLLS- Item 2.3

CONSIDERED: A report providing an overview of the usage of the Pupil Growth and Falling Rolls Contingency Funds in the 2025-26 financial year and the likely funding requirements for the 2026-27 and 2027-28 financial years. The report also requested Schools Forum consideration of a proposal to cease the operation of the Falling Rolls Fund for the 2027-28 financial year.

RECOMMENDATIONS:

The Schools Forum was asked:

a. To note the usage of the Pupil Growth and Falling Rolls Contingency Funds in the financial year 2025-26, as detailed in this report.
b. To note and approve the forecast usage of the Pupil Growth and Falling Rolls Contingency Fund for the financial year 2026-27 and to note the forecast usage of the Fund for the 2027-28 financial year, as detailed in this report.
c. To provide approval for the proposed discontinuation of the Falling Rolls Fund for the 2027-28 financial year. Voting Requirement: LA Maintained School & Academy Members

NOTED:

That the current requirement for the Falling Roles Fund—requiring a school to source 60% of its secondary pupils from its catchment area — is challenging within local policy context.

AGREED:

The School Forum:

- Noted items a and b

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- Recommendation (c), regarding the proposed discontinuation of the Falling Rolls Fund for the 2027-28 financial year, was considered by those members eligible to vote, namely local authority maintained school and academy representatives. The Chair invited members to raise any objections to the proposal. No objections were raised by any eligible voting member. The Chair therefore confirmed that the Schools Forum unanimously approved the proposed discontinuation of the Falling Rolls Fund for the 2027-28 financial year.

  Vote outcome: Eligible voting members present: 23 Votes in favour: 23 Votes against: 0. Abstentions: 0.

1332: SCHOOL BALANCES 2025-26- Item 2.4

CONSIDERED: A paper summarising the position of school balances as at 31st March 2026. It compared school balances as at 31st March 2026 with the previous year and summarised the movement in revenue balances between years and between types of school. The position of those schools which had a negative revenue balance as at 31st March 2026 was also identified.

RECOMMENDATIONS: Schools Forum was asked to note the position of school balances as at 31st March 2026.

NOTED:
Members noted that the report on local authority-maintained school balances now provides only a partial picture of the financial position across North Yorkshire schools due to the growth in academies. The report continues to be presented for transparency and context, but members were invited to consider its future relevance and provide feedback on whether it should continue in its current format.

Members discussed the ongoing value of receiving information on maintained school balances. It was noted that the data has limited direct influence on Schools Forum decisions but provides useful context on the financial position of schools and can support wider lobbying on school funding. Members highlighted the benefits of transparency and public accountability and suggested that, where possible, consideration could be given to incorporating academy sector information to provide a more complete picture. There was general support for continuing to share the information.

AGREED: The North Yorkshire Schools Forum noted and approved the contents of this paper.

1333: DfE UPFRONT MAINSTREAM FUNDING CONSULTATION: RESPONSE- Item 2.5

CONSIDERED: Members received an update on the DfE consultation regarding the future funding of SEND support in mainstream schools. The proposals would increase the level of need expected to be met through schools' delegated funding and transfer a proportion of High Needs funding into school budget allocations through a new local SEND inclusion factor.

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It was noted that the consultation timescales did not allow sufficient opportunity for meaningful engagement with schools or detailed financial modelling, and therefore North Yorkshire had not submitted an expression of interest for implementation in 2027-28. Members were advised that there are a number of unresolved issues and risks, including the potential for uneven funding impacts across schools, implications for small schools, and uncertainty around future national arrangements.
The local authority intends to continue reviewing the proposals through the High Needs Funding Sub-Group during 2026-27, with a view to being better placed to respond to future opportunities to participate in the programme.

NOTED: Schools Forum noted the update and agreed that the proposals would be considered further by the High Needs Funding Sub-Group during 2026-27 to enable detailed modelling, engagement and development of North Yorkshire's position for future participation in the DfE programme.

1334: AOB

Members discussed arrangements for the November Schools Forum meeting. There was general support for holding the meeting in person, with members commenting that face-to-face meetings encourage greater engagement and discussion. It was noted, however, that the November agenda is expected to be substantial and that maintaining attendance and voting capacity would be important. The Forum agreed that members would be consulted on their availability and commitment to attend an in-person meeting, following which a final decision on the meeting format would be made and communicated.

1335: MEETINGS:

Thursday 19 November 2026- TBC
Thursday 10 December 2026 (provisional)-TEAMS
21/1/2027-TEAMS
18/3/2027-TEAMS
20/5/2027-TEAMS
23/9/2027-TEAMS
25/11/2027-TEAMS
9/12/2027 (Provisional)

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