

NORTH YORKSHIRE SCHOOLS FORUM

Date of meeting:	Thursday 20 November 2025 (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 Schools Forum 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
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Presenting officer: If not the originator	N/A

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2025**

PRESENT:

Chair:	Ian Yapp – YLT CEO
Primary Headteachers:	Helen Thomson, Ian Mottram, Karen O Donnell
Secondary Headteachers:	Julie Polley
Nursery headteacher:	
Special Headteacher:	Ann-Marie Ellis
Pupil Referral Service:	Gareth Morton
Academies:	Alison Kaye, David Barber, Claire Hurworth, Louise Sagar, Samantha Williams, Kerry Young, Rebecca Broadbent,
Governors:	Ray Wells, Becki Bulmer
Early Years Providers PVI:	
16-19 Providers:	
Diocesan Representatives:	
Trade Unions:	Michelle Jones, Anne Swift
Observers:	Cllr Annabel Wilkinson Cllr Janet Sanderson
In Attendance:	Howard Emmett, Amanda Fielding, Mairi Reed, Louise Wilson, Sally Dunn, Andrea Mansfield (LSO Minute Taker)
Apologies:	Martin Macaulay -RC Diocese Mari Palmer –York CE Diocese Pete Thorpe Mel Hutchinson Helen Williams Jon Watson

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The Chair welcomed everyone to the meeting.

1283: MEMBERSHIP UPDATE

Circulated: A list of the current membership:

The current 8 vacancies were outlined:

Primary LA (Head) (1) Primary LA (Gov) (1), Secondary LA (Head) (1), PRS Academy (1), Academy (4).

Quorum is 40% of members (11).

1284: MINUTES OF THE PREVIOUS MEETING

AGREED: that the minutes of the meeting held on Thursday 18 September 2025 be agreed as an accurate record

1285: MATTERS ARISING

There were no matters arising.

1286: NOTIFICATION OF OTHER URGENT BUSINESS

There were no notifications of other urgent business for consideration.

1287: 2026-27 School Funding Consultation Results - Item 2.1

CONSIDERED: A report providing the results of the 2026-27 School Funding Consultation that ran from 19 September 2025 to 24 October 2025. There had been 42 responses including 60 schools and academies (18.02% response rate). The report requested the Schools Forum consider:

- The consultation option to be endorsed in relation to the level of the Minimum Funding Guarantee.
- The methodology to be endorsed for use in the allocation to school budgets of any surplus funding available within the Schools Block DSG after the calculation of the school funding formula using NFF values.
- The capping and scaling methodology to be endorsed for use in the recovery of any funding shortfall, in excess of the value of the mitigating support measures, on the Schools Block DSG after the calculation of the school funding formula using NFF values.
- The Local Authority proposal to transfer funding from the Schools Block to the High Needs Block

Alongside the 2026–27 School Funding Consultation Results report, an overview of the DfE 2026–27 Funding Update, published on 19 November, and HNB Context and Visions were also presented.

The DfE 2026–27 Funding Update, published on 19 November, confirmed £50.9 billion provisional funding for mainstream schools via the National Funding Formula (NFF), incorporating rolled-in grants (SBSG and NICs). Local authorities must align factor values closer to NFF and maintain a minimum funding guarantee of 0% to -0.5%, with limited block transfers allowed. Free School Meals will extend to all Universal Credit households from September 2026, funded separately. NFF structure remains unchanged, with uplifts applied to most factors and minimum per pupil funding set at

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£5,115 for primary and £6,640 for secondary. A 0% funding floor will protect schools, and premises/business rates funding will continue at local authority level based on 2025–26 figures.

The meeting reviewed the strategic alignment of the Council Plan, NYSCP Strategy, and SEND Strategy, all supporting inclusion and safeguarding. Updates included progress on the SEND Transformation Programme, rising EHCP numbers (6,210) with improved timeliness (83.5% within 20 weeks), and trends in exclusions and elective home education. Resources for schools were highlighted, including new toolkits, EBSA support, and expanded EP services. Developments in SEND provision were noted, such as TMP rollout, new special school plans, new capital investment (~£7m), and strengthened contract management. A block transfer request was discussed to fund inclusive education initiatives, TMP expansion, and locality boards to meet current needs.

RECOMMENDATIONS: All members of the North Yorkshire Schools Forum are asked to:

- a) Consider the consultation options to be endorsed by the Schools Forum in respect of:
 - The level of the minimum funding guarantee (MFG) protection for the 2026- 27 financial year.
 - The methodology to be used to deal with any funding surplus or funding shortfall on the 2026-27 schools' block Dedicated Schools Grant (DSG) after the calculation of school budgets.
- b) Approve the transfer of 0.5% of funding from the 2026-27 Schools Block to the High Needs Block, based on the funding mitigations as detailed in section 3.5 of this report.
- c) Endorse the local authority submission of a disapplication request to the Secretary of State for the transfer of 1% from the 2026-27 Schools Block to the High Needs Block, based on the funding mitigations as detailed in section 3.5 of this report.

NOTED:

A member stated that they would vote against transferring mainstream funds to the High Needs (HN) block, citing concerns that mainstream schools require more funding to meet SEN costs without compromising provision for non-SEN pupils. They highlighted risks of funding caps, argued that the HN deficit should be addressed through fairer DfE allocations and a stronger national campaign, and suggested rationalising HN spending by using surplus mainstream capacity to reduce transport and private provision costs. It was noted that NYC's HN overspend is average nationally, and reducing debt via mainstream transfers could weaken efforts for a government write-off, which councils are collectively seeking.

A member acknowledged that funding pressures are significant, and concerns were raised that transferring money from an already depleted mainstream pot to the High Needs Block does not resolve the underlying issue. Members expressed reluctance to support the move, noting it shifts resources within a pressured system rather than addressing the root cause.

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A member highlighted a dilemma: transferring £2m from reserves to the High Needs block could provide immediate support but risks masking systemic issues. The question posed was whether the funds are better used to alleviate current pressures in High Needs or retained in reserves, where they cannot be redirected, ensuring transparency of the underlying funding challenges.

It was noted that the preferred approach would be to run the formula as usual and use £2.3m from reserves to support High Needs funding and maintain improved performance. To achieve this, a block transfer is required, as reserves must be released into the total schools funding. A 0.5% transfer would move funds from reserves to High Needs without reducing school budgets, while a 1% transfer would have the same effect but could require capping and scaling, impacting around 150 schools. One option under consultation (1%) requires Secretary of State approval, and the local authority emphasised its commitment to collaborative decision-making with school leaders.

A member raised concern that using reserves to balance school funding ultimately depletes those reserves, reducing future flexibility if schools need that funding later.

It was noted that while reserves exist, DfE requires movement from LA's toward NFF values, and NYC is already aligned. Releasing reserves into the High Needs Block via a block transfer would allow funds to be used locally for pupils now; without the transfer, the money remains in reserves.

A members asked what were the feelings about the anticipated White paper- are schools likely to be funded differently anytime soon?

Reply: The anticipated White Paper does not indicate any changes to school funding or the writing off, of accumulated deficits, meaning financial pressures will likely persist. One Local Authority is projecting a £350m deficit by year-end, while North Yorkshire Council forecasts c.£26m, which is significant but comparatively better. Some authorities have been challenged by external auditors for insufficient action on addressing rising high-needs costs. Overall, the White Paper aligns with the themes already reflected in NYC's current plans.

A question was raised about whether NFF allocations include notional per-pupil SEN funding for EHCP costs. It was confirmed that the NFF does include this notional funding within the overall allocation received by schools.

It was shared as an additional point that analysis of referral patterns shows that secondary schools are now broadly in line with national levels for requests for support and assessments, having previously lagged behind. Primary schools, however, have seen a significant increase, with requests rising from just over 500 last year to 750 this year, and 350 more EHCPs now supported in primary settings. Early identification is improving outcomes for

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children, and there is a focus on ensuring appropriate banding for support. The aim is to maintain non-statutory support at early stages to help children succeed in their local mainstream schools.

Clarification was sought on whether the 0.5% transfer could be funded without fully using reserve transfer. It was explained that modelling shows approximately £800k headroom if all proposed funding mitigations are applied. Risks remain due to unpublished figures, but the headroom could reduce reliance on reserves if actual funding increases materialise.

Members discussed lobbying for fairer High Needs funding. It was confirmed that NYC continues to press ministers and the DfE for increased allocations and is actively involved in the f40 group's national lobbying efforts. Concerns were raised about NYC being among the lowest-funded areas and the need to raise local awareness of funding levels. Staff unions representative shared that they continue to report significant stress in schools due to underfunding, and the ongoing School Cuts campaign provides resources for lobbying MPs.

It was noted that schools continue to feel financial pressure, and while reserves are intended for a "rainy day," many feel that day has arrived. Members emphasised the severe funding shortfall, NYC's low funding levels, and ongoing lobbying efforts, including work through the f40 group. The dilemma remains whether to retain reserves for future needs or use them now to address current pressures, acknowledging there is no simple solution.

The Chair acknowledged the challenging nature of the discussion and urged careful communication of the reasons behind members' votes. It was suggested that concerns over funding levels could be raised formally with the DfE, as has been done previously through letters from the local authority and the Chair.

AGREED:

- The members of the Schools Forum voted to support Option 2- Maximum level of MFG Protection DfE Threshold 0%

Option 1: Minimum DfE Threshold -0.5%

Option 2: Maximum DfE Threshold 0%

Vote: Option 1: 1

Option 2: 13

Abstain 0

- The members of the Schools Forum voted to support Option 1-methodology for the Allocation of Any Surplus Funding:

Option 1 Age Weighted Pupil Unit (AWPU) values increased

Option 2 Lump Sum Formula Factor Value increased

Vote: Option 1: 14

Option 2: 0

Abstain 0

- The members of the Schools Forum voted to support Option 2-methodology for the Operation of Capping and Scaling to Recover Any Funding Shortfall:

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***Option 1:** A lower gains cap percentage and a lower scaling back of gains percentage*

***Option 2:** A higher gains cap percentage and a higher scaling back of gains percentage*

Vote: Option 1: 3

Option 2: 11

Abstain 0

- The members of the School Forum supported option 1-the transfer of 0.5% of funding from the 2026-27 Schools Block to the High Needs Block, based on the funding mitigations as detailed in section 3.5 of the report and supported the local authority submission of a disapplication request to the Secretary of State for the transfer of option 1 from the 2026-27 Schools Block to the High Needs Block:

Votes:

Option 1: 0.5% Funding Transfer

Agreed: 12

Against 2

Option 2: 1% Funding Transfer

Agreed: 0

Against:15

1288: 2026-27 Special Schools Funding Consultation Results -Item 2.2

CONSIDERED: A report providing the results of the 2026-27 Special Schools Funding Consultation that ran from 19th September 2025 to 24th October 2025.

RECOMMENDATIONS: The North Yorkshire Schools Forum members are asked to comment on the outcome of the 2026-27 special school funding consultation. The views of the Schools Forum will be submitted as part of the approval requests to CYPS Executive Members and the Executive.

AGREED:

- The Schools Forum agreed to note the contents of the report.

1289: 2026-27 School Funding: De-Delegation – School Improvement -Item 2.3

CONSIDERED: A report providing LA proposals requesting de-delegation of funding (buy back for maintained nursery schools, special schools and PRU) from school budgets in the 2026-27 financial year to fund statutory services for the provision of school improvement core activities to maintained schools.

RECOMMENDATIONS: The North Yorkshire Schools Forum Schools members from LA maintained primary, secondary and special schools and PRS only (in relevant phase) are asked to approve by vote, the options for the de-delegation of funding for LA maintained primary and secondary schools and buyback options for maintained nursery schools, special schools and PRUs for the provision of school improvement core activities to maintained schools for the 2026-27 financial year.

AGREED:

- LA-maintained primary sector Schools Forum members voted to approve the de-delegation of funding for the statutory service provision of school improvement core activities for the 2026-27 financial on the basis of a lump sum per school of £3,360 and a per pupil amount of £2.47.

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- LA-maintained secondary sector Schools Forum members voted to approve the de-delegation of funding for the statutory service provision of school improvement core activities for the 2026-27 financial on the basis of a lump sum per school of £3,360 and a per pupil amount of £3.00.

Vote: For 2 Against 0 Abstain 0

- LA maintained school members of the Schools Forum voted to support the LA requesting maintained nursery schools to approve the buyback charge based on the Primary School de-delegation methodology for the statutory service provision of school improvement core activities for the 2026-27 financial year.

Vote: For 7 Against 0 Abstain 0

- LA maintained school members of the Schools Forum voted to support the LA requesting special schools and PRS to approve the buyback charge based on for the Secondary School de-delegation methodology for statutory service provision of school improvement core activities for the 2026-27 financial year.

Vote: For 6 Against 1 Abstain 0**1290: 2026-27 School Funding: De-Delegation –Contingency Budgets -Item 2.4**

CONSIDERED: A report detailing the LA proposals for the de-delegated contingency budgets for the 2026-27 financial year and the estimated reserves position for these budgets. The report also provides an overview of the use of de-delegated funding in relation to Schools in Financial Difficulty and Unreasonable School Expenditure Contingencies.

RECOMMENDATIONS: The North Yorkshire Schools forum members from LA maintained primary, secondary Schools are asked to approve by vote, the proposals for the continued de-delegation of the Schools in Financial Difficulty – Schools Causing Concern element. It is proposed to use reserves to fund the requirements in relation to Schools in Financial Difficulty – Financial Awards and School Redundancy Costs Contribution elements and Unreasonable School Expenditure for the 2026-27 financial year

NOTED:

A proposal was raised to reduce the Schools Causing Concern de-delegation from £7.51 to £4 per pupil, using reserves to cover any shortfall and maintain a lower reserve level, which would also offset the proposed TU de-delegation increase. Officers advised that voting must be on the proposals presented in the paper, not alternative models, and emphasised the need to monitor reserve levels. It was noted that the Schools Causing Concern reserve is relatively low and intended for exceptional support needs. The Chair confirmed that voting would proceed on the published proposals.

AGREED:

- **LA-maintained primary phase Schools Forum members voted to support the de-delegation detailed below:**

Schools in Financial Difficulty:

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- i. To de-delegate £7.51 in relation to the per pupil Schools Causing Concern funding for 2026-27.

Vote: For 2 Against 1 Abstain 0

- ii. To utilise the reserve funding to support the Schools in Financial Difficulty element of the de-delegation contingency for the 2026-27 financial year with no de-delegation of funds for this element of the funding for next financial year.

Vote: For 3 Against 0 Abstain 0

- iii. To utilise the reserve funding to support the School Redundancy Costs Contribution element of the de-delegation contingency for the 2026-27 financial year with no de-delegation of funds for this element of the funding for next financial year.

Vote: For 3 Against 0 Abstain 0

Unreasonable School Expenditure

- i. To utilise the reserve funding to support the Unreasonable School Expenditure de-delegation contingency for the 2026-27 financial year with no de-delegation of funds for this element of the funding for next financial year.

Vote: For 3 Against 0 Abstain 0

- **LA-maintained secondary phase Schools Forum members voted to support the de-delegation of:**

Schools in Financial Difficulty:

- i. To de-delegate £7.51 in relation to the per pupil Schools Causing Concern funding.
- ii. To utilise the reserve funding to support the Schools in Financial Difficulty element of the de-delegation contingency for the 2026-27 financial year with no de-delegation of funds for this element of the funding for next financial year.
- iii. To utilise the reserve funding to support the School Redundancy Costs Contribution element of the de-delegation contingency for the 2026-27 financial year with no de-delegation of funds for this element of the funding for next financial year.

Vote: For 2 Against 0 Abstain 0

Unreasonable School Expenditure

- i. To utilise the reserve funding to support the Unreasonable School Expenditure de-delegation contingency for the 2026-27 financial year with no de-delegation of funds for this element of the funding for next financial year

Vote: For 2 Against 0 Abstain 0

- **LA maintained Schools Forum members** endorsed the LA requesting LA maintained nursery schools, special schools and PRS service buyback based on the 2026-27 LA maintained school per pupil charge on a per place basis in relation to Schools Causing Concern funding.

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CONSIDERED: A report seeking approval for continued de-delegation of funds to support local trade union facilities arrangements.

RECOMMENDATIONS: The North Yorkshire Schools Forum members from LA maintained schools only (by phase) are asked to:

- Continue to support the principle of de-delegation of funds for maintained schools
- Agree to an increase of £0.52 for 2026-27, equating to £4.46 per pupil.

AGREED:

- To continue to support the principle of de-delegation of funds for maintained schools
- Agree to an increase of £0.52 for 2026-27, equating to £4.46 per pupil.

Noted: Secondary school member JP- left after the start of the item but wanted it noted that they supported the recommendations.

LA Primary Maintained School members only **Vote: For 3 Against 0 Abstain 0**

LA Secondary Maintained School Members **Vote: For 1(2)¹ Against 0 Abstain 0**

All LA Maintained School Members voted on LA requesting LA maintained nursery schools, special schools and PRS service buyback to support local trade union facilities arrangements. **Vote: For:3 (4) Against 0 Abstain 0**

1292: Early Years Funding Update -Item 2.6

CONSIDERED: A report considering the results and feedback received from the principle-based consultation undertaken on the funding rates to be paid to early years' providers for the funded early years entitlement for disadvantaged 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 2026-27 financial year. 101 Providers responded to the consultation.

AGREED: The members of the Schools Forum agreed to:

- To note the latest information received from the DfE in respect of early years funding for the 2026-27 financial year.
- To note the results from the principle-based funding consultation 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 disadvantaged 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 2026-27 financial year.

¹ A secondary school representation left the meeting before the formal vote but indicated in the Chat function their support for the proposal

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CONSIDERED: None received

1294: MEETINGS: members to be advised within 10 working days if the December meeting is to be stood down.

Thursday 11 December 2025 (provisional)

Thursday 22 January 2026

Thursday 19 March 2026

Thursday 21 May 2026

Thursday 24 September 2026

Thursday 19 November 2026

Thursday 10 December 2026 (provisional)