

**Report to the Schools Forum
Meeting to be held on Tuesday 14th October 2025**

Item 4

Schools Forum Minutes 1st July 2025

Contact for further information:

Schools Forum Clerk
schoolsforum@lancashire.gov.uk

Brief Summary

Copy of Minutes from last meeting to be reviewed and confirmed.

Recommendation

The Working Group is asked to:

- a) Note the Minutes as correct
- b) Express any views



Lancashire County Council

Lancashire Schools Forum

Tuesday, 1 July 2025, 10.00 am in the Savoy Suite, The Exchange, County Hall, Preston

Present

Primary School Governors

Stephen Booth (*LSF Vice-chair*)

Gerard Collins

Lindy King

Sam Ud-din

Tim Young

Primary School Headteachers

Daniel Ballard (*LSF chair*)

Sarah Barton

Jenny Birkin

Sarah Robson

Helen Shaw

Anna Yates

Kirsty Sutton

Secondary School Governors

Janice Astley

Brian Rollo

Academy Rep

John Davey

James Keulemans

Steve Campbell

John Tarbox

Special School Governor

Mandy Howarth

Special School Headteacher

Claire Thompson (*HN chair*)

Short Stay Governor

Sharon Bennett

Short Stay Headteacher

Abigale Bowe (*HN Vice chair*)

Nursery School Headteacher

Jan Holmes

Nursery School Governor

Thelma Cullen

PVI Members

Sharon Fenton

Philippa Perks (*EY chair*)

Hilary Sharples

Voting Members

CC Andy Blake

Observers - Non-Voting Representatives

CC Matthew Salter

Rafeal Schiel

Kate Walker

Ian Watkinson

Paula Evans

Members of the Public

Sarah Carr

Antonia Graham [PVI]

Lorraine Stones [PVI]

Julie Danson [PVI]

Kelly Williamson [PVI]

Thomas Tristram [PVI]

Officers in Attendance

Matthew Dexter

Aby Hardy

Sapphire Murray

Toni Rafferty

Paul Turner



1. Attendance and Apologies for Absence

Apologies have been received from Mary Lyle, Oliver Handley, Vanessa Nice, CC Ian Duxbury, George Krawiec, Bill Mann, Neil Gurman, Khadija Saeed, Rebecca Lindley, Deanne Marsh, Sarah McGladrigan and Ivan Catlow

2. Substitute Members

We had Hilary Sharples substituting for Sarah McGladrigan

3. Minutes of the Last Meeting

The minutes of the last meeting held on 11th March 2025, were agreed as the correct record

4. Matters Arising

No matters arising from the minutes of the meeting held on 11 March 2025 that are not covered elsewhere on the agenda.

5. School Forum Membership

Detail

This report provides information on Forum membership issues that have arisen since the last Forum meeting. Details are provided below.

Schools Forum Annual Membership Review for September 2025

This report provides information on membership changes since the last meeting and a summary of the annual membership process.

Members leaving the Forum as part of the annual membership review include:

Steven Broomhead	Primary Governor
Mike Wright	Secondary Headteacher
Steve Campbell	Academy Secondary Headteacher

The LA is making arrangements to seek replacement representatives for September 2025.

A number of these colleagues who are leaving are active and longstanding members, and the Forum will want to express thanks for their contributions and wish them well for the future.

Since the last Schools Forum meeting, several representatives have been elected due to mid-year changes.

County Councillor Andy Blake	Children, Families and Skills Scrutiny Committee
County Councillor Ian Duxbury	Council Member
County Councillor Marion Atkinson	Children, Families and Skills Scrutiny Committee
County Councillor Matthew Salter	Cabinet Member for Education and Skills [Observer]

Welcome to any members attending their first schools forum meeting

Schools Forum Chair and Vice Chair for the 2025/26 Academic Year



As part of the annual membership process, agreement is needed to re-elect the Schools Forum Chairs ahead of the new academic year, as well as the chairs of the individual working groups.

Schools Forum Chair & Vice Chair

Daniel and Stephen to continue unopposed unless any other nominations/opposition at the meeting.

Working Group Chair's

Nominations were also sought at the three working groups, of which the working groups;

- Supported Claire Thompson continuing as High Needs Block Chair from September 2025, unopposed.
- Supported Philippa Perks continuing as Early Years Block Chair from September 2025, unopposed.
- Notification was received from Steve Campbell that he was to step down as Schools Block chair from August 2025, and as such nominations were requested to succeed Steve as Schools Block working group chair from September 2025. All nominations were asked to be sent by 24/06/25, and one nomination was received from Oliver Handley. As only one nomination was received, Oliver will be appointed at Schools Block working group chair from September 2025.

Schools Forum Representatives

The Schools Forum is one of the organisations where members sit on various other groups. The Schools Forum has historically been requested to assist with membership from a range organisations across the sector.

These include:

- **Lancashire School's Forum**
- **PHIL (Primary Headteachers in Lancashire)**
- **LASSH (Lancashire Association of Secondary School Headteachers)**
- **LSSHTA Lancashire Association of Secondary School**
- **LSSHTA Lancashire Special School Association**
- **Lancashire Academy Schools**
- **Lancashire Federation of Nursery Headteachers**
- **LASBM Lancashire Association of School Business Managers**
- **LASGB Lancashire Association of School Governing Bodies**

If you are interested in any of the vacancies above, please contact the Schools Forum Clerk.

The Forum:

- a) Noted the report.**
- b) Expressed thanks to those members and officers leaving the Forum.**
- c) Welcomed new members.**
- d) Supported Daniel Ballard as the Forum Chair and Stephen Booth as the Forum Vice-Chair for 2025/26, unopposed.**
- e) Appointed Oliver Handley as Schools Block Chair from September 2025.**



- f) Supported Claire Thompson continuing as High Needs Block Chair from September 2025, unopposed.
- g) Supported Philippa Perks continuing as Early Years Block Chair from September 2025, unopposed.
- h) Asked to not the LASGB is now LGA [Lancashire Governors Association]
- i) Individual members not already on the Education Digital Services Schools Focus Group are asked to consider volunteering, specifically School Business managers and Secondary School Head teachers.

6. Recommendations from the Schools Block Working Group

Detail

On 17 June 2025, the Schools Block Working Group considered several reports. A summary of the information presented, and the Working Group's recommendations are provided below:

61. School Budget Outturn 2024/25 (Attached)

Detail

This report provides information on the Schools Budget outturn position for 2024/25. The Overall Schools Budget outturn position for 2024/25 showed an overspend of circa £40.85m. Further details are provided below in connection with each funding block.

Central Schools Services Block (CSSB)

CSSB 2024/25			
	Budget (£)	Actual (£)	Variance (£)
CSSB			
ESG Retained Duties	2,591,000	2,591,000	0
Overheads	851,000	851,000	0
Copyright Licence	1,202,549	1,293,497	90,948
School Forum	188,000	188,000	0
Pupil Access (Admissions)	1,400,000	1,400,000	0
Rates Rebates	-75,000	161,075	236,075
PFI - Historic	2,672,368	2,520,620	-151,748
Total Grant	-8,829,917	-8,876,458	-46,541
Total Variance	0	128,734	128,734

PFI - Historic

This budget line ended with an underspend of £151,748. This was due to ongoing expenditure on the former Thomas Whitham Sixth Form PFI site, with the former Hambledon site is now occupied by Broadfield Special School remaining in line with budget. To protect this funding, the ESFA agreed to fund this via CSSB.



There are ongoing discussions within the LA regarding the usage of the former Thomas Whitham Sixth Form, which may lead to a review of the costs within the CSSB.

Other CSSB budget lines ended the year on or near the agreed budget level.

Schools Block

Schools Block 2024/25			
	Budget (£)	Actual (£)	Variance (£)
Maintained Schools	688,009,465	665,266,978	-22,742,488
Growth	1,500,000	1,922,807	422,807
Academy Recoupment	289,674,750	312,065,138	22,390,388
Total Expenditure	979,184,215	979,254,923	70,707
Total Grant	-978,029,652	-978,029,652	0
Total Variance	1,154,563	1,225,271	70,707

Maintained Schools/Academy Recoupment

The total Schools Block expenditure on maintained schools for 2024/25 ended the year largely in line with the agreed budget, taking into account that the LA required £1.154m of DSG reserves to set the budget on schools block in 2024/25. Academy recoupment increased by circa £22m during the year, which is balanced out by the underspend of £22m in the maintained sector. There was also an overspend in the growth fund of £422k.

High Needs Block

High Needs Block 2024/25			
	Budget (£)	Actual (£)	Variance (£)
Mainstream Schools	30,457,671	46,971,479	16,513,808
Special Schools	83,242,967	89,626,107	6,383,140
Alternative Provision	14,129,270	15,587,835	1,458,566
Further Education - Post 16	11,147,207	12,060,870	913,663
High Needs Growth	9,092,447	0	-9,092,447
HNB Supplementary Grant	3,478,462	3,478,462	0
Commissioned Central Services	41,312,171	66,517,195	25,205,024
Exclusions	-1,000,000	-2,063,326	-1,063,326
Total Grant	-191,860,195	-191,761,693	98,502
Total Variance	0	40,416,929	40,416,929

The outturn position for the 2024/25 High Needs Block (HNB) revealed a circa **£40.42 overspend**. Further information is provided below and the High Needs Funding Block Monitoring at Year End 2024/25 can be found in Appendix A:

Maintained Schools



Actual costs on all elements of maintained schools HNB expenditure, including mainstream schools, special schools and PRUs were above the budgeted figure. The most significant variance related to mainstream schools which represented a circa 50% growth in expenditure compared to the budget. Special Schools grew by over 7% and Alternative Provision by over 10%.

High Needs Growth

When the 2024/25 Schools Budget was being set, provision was made for HNB growth, which was forecast at circa £9m for the year. This provision was fully utilised in year to partially offset the increased expenditure across the HNB school budget lines.

Commissioned Services

The commissioned services expenditure ended the year with an overspend of over £25m. A more detailed breakdown of the HNB expenditure against the agreed budget lines is provided at Annex A, however the main reason for the overspend is due to placements in the independent non maintained special school (INMSS) sector of which a £24.60m occurred. As members will be aware, strategies are being deployed to enhance maintained provision within the county, through SEN Units and increased special school capacity, but this will take time to feed through into the budget position.

Early Years Block (EYB)

Early Years Block Expenditure			
	Budget	Final Allocation	Difference
Under 2YO	16,538,685	22,431,778	5,893,093
2YO	37,648,617	36,714,793	-933,824
3_4 YO	84,476,476	85,409,205	932,729
Early Years DAF	863,590	429,373	-434,217
Early Years PPG	1,812,463	1,286,546	-525,917
SEN Inclusion Fund	2,650,000	1,790,105	-859,895
Total	143,989,832	148,061,800	4,071,968

Early Years Block Income			
	Budget	Final Allocation	Difference
Under 2YO	-£16,838,685	-£24,304,223	-£7,465,538
2YO	-£37,319,388	-£36,254,866	£1,064,522
3_4 YO	-£87,155,549	-£85,062,249	£2,093,300
Early Years DAF	-£863,590	-£863,590	£0
Early Years PPG	-£1,812,460	-£1,824,357	-£11,897
SEN Inclusion Fund	£0	£0	£0
Total	-£143,989,671	-£148,309,285	-£4,319,614

Overall Difference	
Under 2YO	-£1,572,445
2YO	£130,698
3_4 YO	£3,026,029



Early Years DAF	-£434,217
Early Years PPG	-£537,814
SEN Inclusion Fund	-£859,895
Total	-£247,645

The Early Years Block outturn position for 2024/25 indicates a circa £0.250m underspend.

Further information is provided below:

Under 2-Year-Olds

Early Years Block expenditure relating to under 2-year-olds overspent by £5.89m, however please note that an additional £7.47m of grant income was received to offset the additional expenditure.

2-Year-Olds

Early Years Block expenditure relating to 2-year-olds underspent by £934,000, however a reduction in grant income was received totalling £1m.

3- to 4-Year-Olds

Early Years Block expenditure relating to 3- to 4-year-olds overspent by £933,000. In addition, a reduction in grant was received totalling £2m. It should be noted that for 3- to 4-year-olds the LA are notified of the forecasted income in December 2023, however, final Early Years DSG was confirmed in July 2024.

Disability Access Fund

This budget line was circa £434,000 below budget.

Early Years Pupil Premium

This budget line was circa £526,000 below budget

SEN Inclusion Fund

The SEN Inclusion Fund expenditure was circa £860,000 under budget. This is due to c£1m of EY top up funding being transferred to the HNB.

Overall Variance

In summary, the EYB ended the 2024/25 financial year with a £0.250m underspend. Due to the extended entitlements within Under 2-year-olds and 2-year-olds, the DfE are funding LAs on a termly basis, ensuring that take up is funded appropriately. Whilst overall the EYB has remained within budget, there is concern of the overspend within the 3- to 4-year-old entitlement, however this has been largely offset with a saving within the under 2-year-old entitlement.

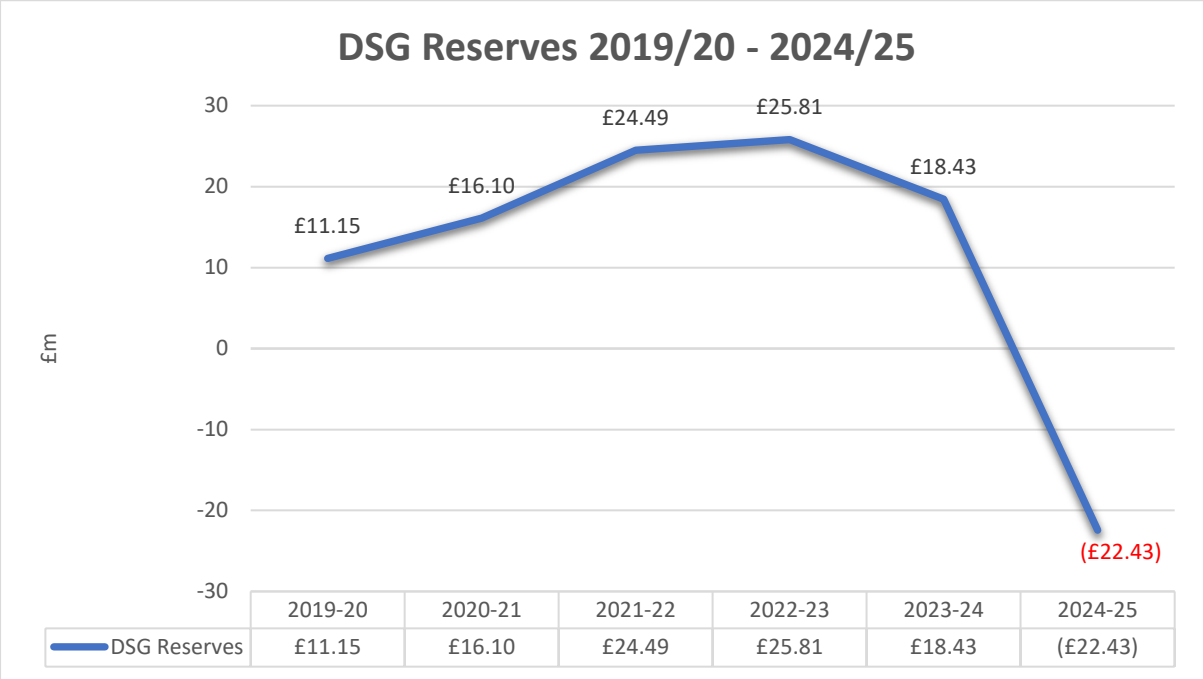
Due to the continuation of the extended entitlements within Under 2-year-olds and 2-year-olds in 2025/26, a significant part of the initial allocation received is based on forecasted national data/estimated take up. This could lead to significant variances within these entitlements until we move towards a more stable annual funding allocation in line with the 3- to 4-year-old entitlements.



Clawback

As previously agreed with schools forum, clawback recovered from schools who's balance was in excess of the 12% threshold as stated within the policy has been transferred from the schools in financial difficulty reserve to the DSG. This totals £677,000.

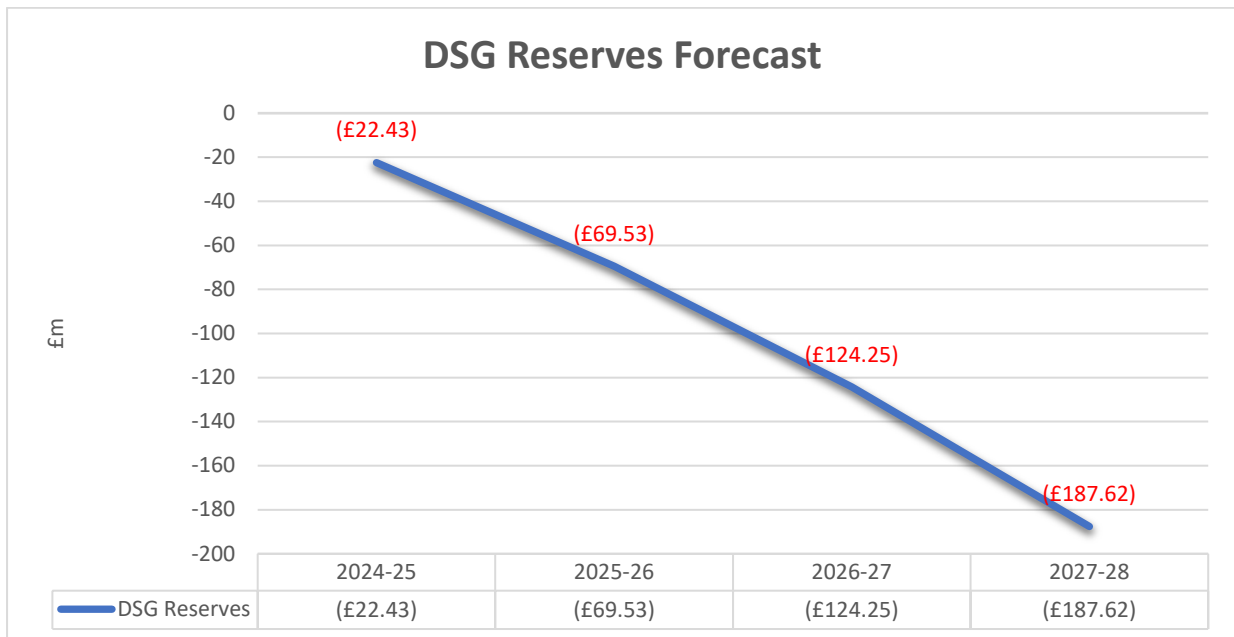
DSG Reserves



Due to pressures on the High Needs Block, Lancashire has ended the 2024/25 financial year with an overall DSG deficit/negative reserve position of £22.43m. If current trends continue, the deficit is forecasted to increase to £69.53m by March 2026. As a reminder, the statutory override is due to end by March 2026, meaning that DSG deficits will no longer be allowed to be carried forward, with DSG deficit being incorporated into the LA general fund budget.

Since the working groups an update has been received from the government, announcing that the statutory override will be extended to March 2028





The working group:

Noted the report

Discussed:

- There wasn't at the time an update on the statutory override, though an autumn paper is anticipated. A DSG recovery plan must be developed, with a deadline assumed to be around November. The DfE will raise the issue after the outturn submission in August.
- The LA must take an active and innovative approach to reducing the DSG deficit. Ideas for offsetting spend have been reviewed and will be presented to the forum in the autumn term for feedback. There is no DfE budget to cover overspends, reinforcing the need for local action.

The Forum noted the report.

62. School Balances 2024/25 (Attached)

Detail

School Balances Outturn 2024/25

This report sets out the year end position of schools' delegated budgets at 31 March 2025.

The overall school balances decreased from £69.79m to £66.93m, an overall reduction of £2.86m. The tables below show analysis of school balances by phase at the end of the financial year 2024/25.

The aggregate school balances figure at 31 March 2025 includes 16 primary and 3 secondary academisations during the financial year. *Without the academy conversions school balances would have largely remained unchanged with an aggregate change of £0.017m.*



2024/25 School Balances – Number of Schools in Surplus/Deficit by Phase

A total of 44 schools ended the 2024/25 financial year in deficit. The number of schools in deficit on 31 March 2025 has increased by 6 schools in deficit a year earlier.

At the opposite end, a total of 12 schools ended the 2024/25 financial year with a balance deemed in excess of the clawback policy, which is the same number as the 2023/24 financial year.

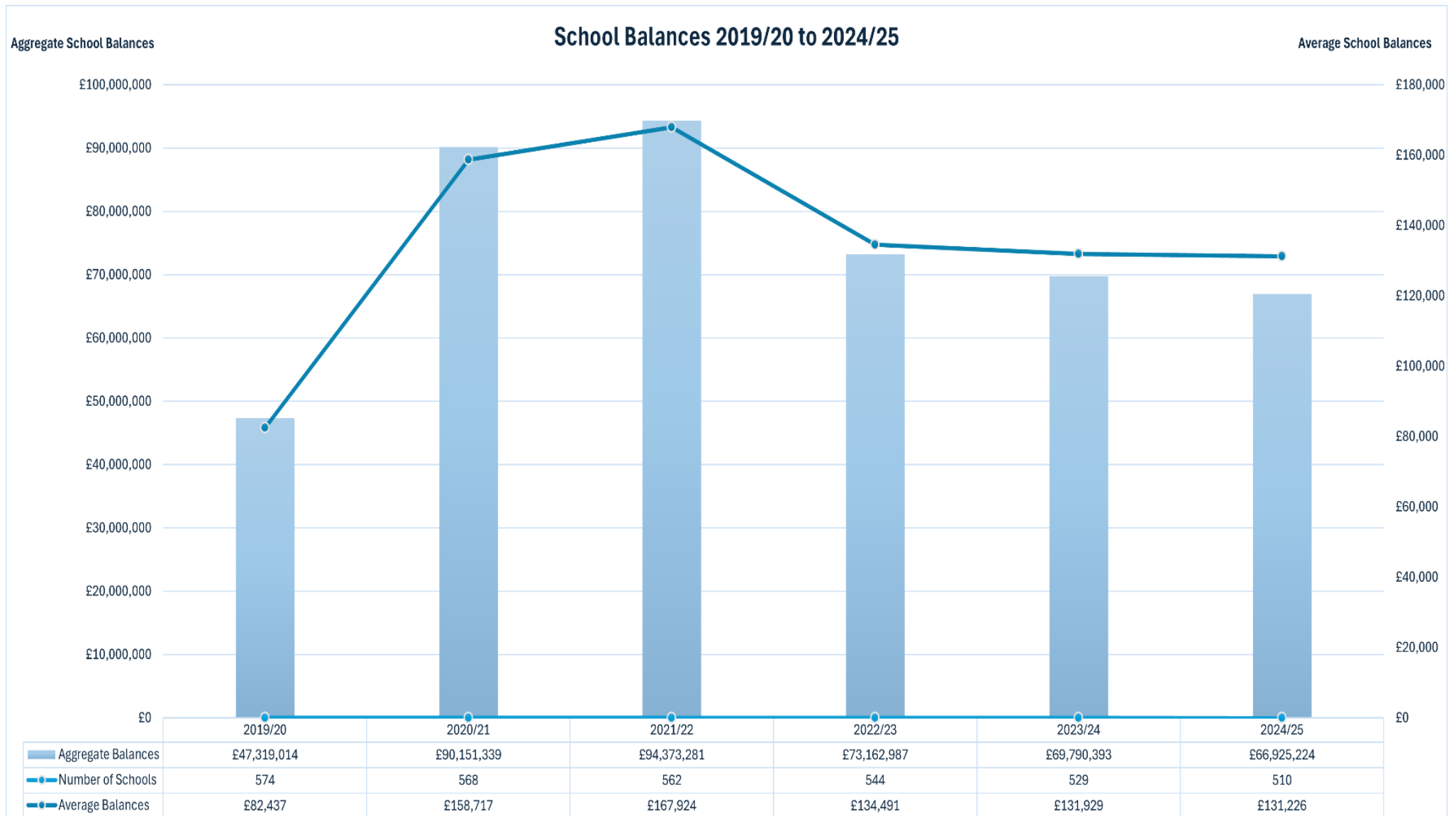
Clawback 2024/25

At 31st March 2025, 12 schools held balances above the clawback guidelines. This totalled £292,000, of which 50% (£146,000) of the total balance in excess will be recovered.

All maintained schools received a letter on the Schools Portal on 9 May 2025, outlining the year-end balance in accordance with the clawback policy. Clawback funds will be transferred to assist with pressures in the high needs block.



Aggregate School Balances by Year



A further analysis was undertaken to compare the 2024/25 schools outturn to the historic 2019/20 schools outturn.

The analysis shows that schools are continuing to hold balances some £20m higher than the historic 2019/20 total of £47m. The average school balance as shown in the 'aggregate school balances by year' graph is £131,000. This is £49,000 higher than the historic 2019/20 average of £82,000.

Furthermore, with academy conversions there are less Lancashire schools in 2024/25 compared to 2019/20, meaning that Lancashire has less schools but higher collective balances. Across all sectors both the average balance and aggregate balances are higher in 2024/25 when compared to 2019/20, with significant increases within the Secondary, Special, and Short Stay sectors.

Analysis provided by schools about their year-end position at 31 March 2025 indicates that circa £15.5m of total balances are classed as 'committed'.

Individual School Balances 2024/25

1. Dedicated Schools Grant (DSG Reserve)

The DSG overspent by £40.85m in 2024/25. Details of this figure are provided in the Schools Budget Outturn report 2024/25. The outturn position for the DSG Reserve is therefore a balance of **-£22.40m**.

2. Schools in Financial Difficulty Reserve

To maximise the funding available in the Schools in Financial Difficulty (SIFD) Reserve, several adjustments have been made to the reserve in 2024/25.

As members will be aware, converter academies take a surplus or deficit balance with them to their academy trust, whereas the balance at forced academies remains with the LA. Where balances have accrued due to academy conversions, these have been transferred to the SIFD reserve. The LA have recently created a new cost centre to hold the forced academy conversions of which further detail is provided below. It is proposed that a similar approach is adopted for converter academies.

The reserve has decreased by £0.373m in year. Due to the high level of reserves the de-delegation ask to schools was reduced, and as such a further reduction in reserves is expected at 2025/26 outturn.

3. De-Delegation Reserve

The de-delegation reserve ended the year with a surplus of circa £1.026m.

Members will recall that for the Inclusion Hubs de-delegation the LA includes adjustments relating to inclusion hub funding that has been delegated to banker schools at the start of the year. So that individual school balances at certain banker schools were not artificially high, which would impact on school year end balances reporting and national benchmarking, the £750,000 remaining balance was held by the LA for year-end accounting purposes and then redistributed to the relevant banker schools in the new financial year.



4. School Teaching and Support Staff Supply Reimbursement Scheme

The staff reimbursement scheme ended the year with an underspend of circa £131,000, leaving an outturn position of circa £1.67m.

The Forum has previously agreed that any year-end balance above £1.5m should be redistributed to scheme members, however it is proposed the £131,000 underspend is put into reserves. For 2026/27, members will need to consider a rise in the premiums charged for the teaching staff scheme, but it may be possible to hold the premiums on the support staff element of the scheme to 2025/26 levels. Further reports will be presented to the Forum in due course.

5. School Reserves

As set out earlier in the report, school balances decreased to c£67m at the end of 2024/25.

6. Schools Forced Conversions Reserve

As mentioned above, the LA has now created a new cost centre to hold forced academy conversions with the balance (surplus or deficit) remaining with the LA. Whilst this is a small balance, ensuring balances of any forced academy conversions do not escalate is key to minimising any financial risk to the LA.

The working group:

Noted the report

Discussed:

- Around 24–25 schools are currently reporting in-year deficits. Comparisons to 2019/20 data were questioned for reliability, though trends remained steady pre-COVID. Concerns were raised about schools' financial commitments, clawback implications, and whether funds are being shifted between blocks. There's a notable contrast between schools in deficit and those with reserves. Regular monitoring (six times a year) is essential to avoid year-end surprises, especially with uncertainties like pay rises.
- There is a need for better financial awareness among governors, as many rely solely on headteachers without understanding the budget. Schools are facing pressures from falling rolls and cold spots, prompting them to increase pupil numbers to secure funding. Suggestions included adding birthrate and pupil number graphs to the governors' handbook and improving communication with LCC. A new dashboard and a designated officer for pupil place planning are being introduced under the new department led by Aby.

The Forum noted the report.

63. Clawback 2024/25 (Attached)

Detail

Lancashire's Scheme for Financing schools includes a balance control mechanism, which is designed to control and clawback, where appropriate, schools' excessive surplus balances.



The clawback mechanism ([section 4.2](#)) states " For schools that hold balances greater than the Authority's recommended guideline the Authority shall be empowered to deduct from the current year's budget share a percentage of the excess surplus balances (clawback) as agreed following consultation with the Lancashire Schools Forum. The rate and any exceptions shall be reviewed annually by the Authority in consultation with the Lancashire Schools Forum, and guidance issued to schools".

"Lancashire Schools Forum can consider exceptional cases for an exemption from the clawback provisions as stipulated in the current clawback policy available on the Schools Forum website".

School Balances and Clawback Policy 2025/26

Whilst clawback had been suspended on year end balances at March 2020, 2021 and 2022, since 2022/23, Schools Forum has voted to reintroduce clawback. The policy is as follows:

- 12% of Consistent Financial Reporting (CFR) income for all phases of maintained school
- A £75,000 minimum balance threshold will be applied.

The Forum are now asked to consider the school balances and clawback policy to be applied at 31 March 2026.

Although the 2024/25 outturn positions have slightly decreased by circa £3m since 2023/24, aggregate school balances however are still some £20m higher than the historic pre 2019/20 average of £45m. The average school balance of £131,000 is also some £49,000 higher than the historic pre 2019/20 average of £82,000.

In addition, current budget submissions for the 2025/26 financial year show a total forecasted outturn of £47.75m, which remains higher than the historical £45m outturn average. The previous two financial years outturn data shows that schools outturn balances increase by c35% compared the initial budget forecast.

DfE guidance has previously stated that balances are deemed in excess, where they are greater than 5% (Secondary) and 8% (Primary, Special, PRU, Maintained Nursery schools) of CFR income. Recent benchmarking has shown that many local authorities implement these recommendations within their clawback policies.

Based on the above information, the local authority has proposed the following options:

- a) Apply the clawback policy in 2025/26, at 12% CFR income threshold to all schools
- b) Apply the clawback policy in 2025/26, but reducing the 12% CFR income threshold down to 8%
- c) Apply the clawback policy in 2025/26, but reducing the 12% CFR income threshold down to 5%



All options include the continuation of the minimum £75,000 balance threshold and clawback would continue to apply as per the below

- A clawback rate of 50% is to be applied to any balance above guideline in the first year a school exceeds the guideline (after adjusting for exemptions)
- A clawback rate of 100% is to be applied to any balance in excess of guideline where the guideline has been breached for two or more consecutive years (after adjusting for exemptions)

The proposed Clawback Policy is attached as Annex B with the local authority recommending **option B**.

The working group:

Noted the Report

Supported recommendation for option B) *Apply the clawback policy in 2025/26, but reducing the 12% CFR income threshold down to 8%*

Discussed:

- Maintained schools benefit from more direct support and guidance compared to others. Academies are not subject to clawback, as trusts manage their own budgets—though this has been debated at ministerial level. Concerns were raised about schools holding large surpluses (e.g., 12%), which is seen as unsustainable. It was suggested that governors and forum members should question such balances, especially when the focus should remain on current pupils.
- Clawback funds are returned to the DSG, and while a 5% threshold was suggested by one schools forum member, it's a significant drop from the previous 12%. Lowering the threshold could impact schools' three-year projections, prompting suggestions for a transitional phase. There were questions about whether per-pupil funding could decrease if the DSG becomes too low. A suggestion was made for more detailed modelling to understand the impact on individual schools, however this is difficult in nature to provide, and whether the forum has the authority to set a maximum surplus limit.

The Forum ratified the working groups' recommendations.

64. Schools in Financial Difficulty Recovery Plan Bids (Attached)

Background

The Schools Forum voted to implement the Clawback policy to excess school balances at 31 March 2023 due to the continued high level of balances across the authority. As a result, circa £751,000 was clawed back from eighteen Schools.

During their meeting on 18 October 2023, the Schools Forum agreed to use some of these funds to support schools in financial difficulty who were actively working with the authority to reduce their deficit.



In line with the Schools in Financial Difficulty policy, schools with recovery plans were eligible to 33% of the greater of the 2022/23 or 2023/24 outturn deficit. This was to be allocated over two financial years. Schools shown in the table below were eligible and received 50% of this funding in the first year, 2024/25. The remaining balance however was only agreed to be payable in 2025/26 if the schools continued to work with the authority and are actively working to reduce the deficit in line with their approved recovery plan and have met the conditions of their recovery plan.

The results of this showed this showed three schools have reached a surplus budget position and as such will not require the 2nd year allocation. There are also two schools that have breached their recovery plans and are not eligible for the 2nd year allocation. In addition, the remaining five schools have a balance in line, or better than their agreed recovery plan and will be eligible for the 2nd year payment.

The working group:

Noted the report

Discussed:

- It was explained that LCC clearly communicated expectations to schools and issued reminders when necessary. Despite these efforts, some schools did not engage with the process.

The Forum noted the report.

65. Schools in Financial Difficulty Bid (Attached)

Detail

SRaS Support Bid Background - Confidential

Previous reports to the Forum have set out the support arrangements developed by the Authority for schools that may be experiencing exceptional financial difficulty. Financial difficulty can arise from several causes which lead either to budget reductions for example due to falling rolls, or from the need for short term increases in expenditure. Examples of these pressures on the school budget requiring short term financial support include:

1. Being judged by OfSTED as Inadequate or Requires Improvement.
2. Identified by the School Advisor/Senior Accountant as requiring additional support for serious educational difficulties or failure to meet attainment targets.
3. Subject to intervention by the Authority.
4. Faced with serious personnel difficulties.

Schools can also face falling roll situations because of demographic changes.

The consequences of these are that the school can experience serious financial difficulty. Schools Forum has agreed that the School Improvement Group (SIG) can provide support to schools in financial difficulty that has resulted from the above.

In addition, the budget is also used to:



- Mitigate the interest charges that would otherwise have to be met by schools that have implemented an agreed recovery plan (i.e. have implemented appropriate measures to ensure that they do not exceed agreed deficit limits);
- Meet the cost of contracting the School Finance Team at an enhanced level.
- Provide financial support to schools where their reserves are not sufficient for the school to meet the full cost of the intervention or restructuring costs themselves, in accordance with the financial support criteria agreed with the Forum.
- Provide one off financial support to schools who otherwise would not be able to recover from a deficit position. As a general guide, SIG suggested that whilst individual circumstances will always need to be taken carefully into account, maximum allocations from the Schools in Financial Difficulty fund in response to an application from an individual school should generally not exceed 33% of the relevant deficit, but many may be lower.

The budget for support is obtained through the de-delegation, which is agreed annually by the Forum, following a consultation with schools.

In recent years, the number of bids for one off support have been limited, with support being primarily offered through the standard support options.

It should also be noted that a small number of schools at the extreme end of the Schools in Financial Difficulty (SIFD) spectrum have accumulated significant structural deficits, deemed as Category 1 on the county council's Schools in Financial Difficulty category warning system for maintained schools. These schools often have a range of difficulties, not simply a deficit budget, which can impact on their ability to recover financially.

It has not been considered appropriate to request one off SIFD support for a number of these schools, as it has been judged that they have a structural deficit with no prospect of financial recovery, and it has been necessary to pursue strategic solutions in respect of these schools.

On 29 April 2025, the School Improvement Group supported the Schools in Financial Difficulty Bid.

The working group:

Noted the report

Supported the Bid

The Forum ratified the working groups' recommendations.

66. De-delegation 2026/27 Proposals (Attached)

In 2025/26, the Forum formally approved 5 service de-delegations, relating to:

- Staff costs – Public Duties/Suspensions
- Heritage Learning Service – (Primary Schools Only)



- Schools Requiring Additional Support
- Inclusion Hubs (Primary Schools Only)
- Children's Champions

Relevant de-delegations were also offered to nursery schools, special schools and PRUs as pooled services buy-backs.

For 2026/27 the following proposals have been received from the relevant services, with a change to the Schools Requiring Additional Support de-delegation, however there is no proposal from the service in relation to the inclusion hubs and as such this will cease to be a de-delegation in 2026/27.

All reports & proposals have been provided in the papers (appendices).

The consultation will be live in September 2025 and will be formally voted on by schools forum at the October schools forum meeting.

- 1. Staff costs – Public Duties/Suspensions**
- 2. Heritage Learning Team – (Primary Schools Only)**
- 3. Schools Requiring Additional Support**
- 4. Children's Champions**
- 5. No proposal was brought forward in relation to the inclusion hub de-delegation.**

The working group:

Noted the report

Staff costs – Public Duties/Suspensions - Jeanette updated the figure from the proposal - 41% now work in academies.

Discussed:

- Heritage Learning Team – (Primary Schools Only): a request was made to clarify
 - how many schools currently use the service
 - how many have borrowed resource boxesThis was asked to review if the service represents good value for money. It was noted that the report lacks information on the impact of the service and what alternatives might exist. An update has been requested from the service for the autumn term meeting [18th September].
- Schools Requiring Additional Support:
 - The Red Book is being revised over the summer, with updates pending Ofsted outcomes. The MIT has supported 87 schools, covering a wide range of settings.
 - The RISE team, currently supporting only four schools, follows a similar model to MIT. Clarification is needed on whether all schools can access



- this support. Schools are encouraged to be proactive and reach out if they anticipate needing assistance.
- Schools may be flagged for financial support following Ofsted notifications, statutory visits, or direct school requests. Examples of such cases were discussed.
 - MIT often requires significant change within a short timeframe. There was discussion around whether MIT should adopt a more supervisory or supportive role in these situations.
 - Children's Champions: Since September, the team has received 447 support requests across various areas. The majority were for exclusion support (243), followed by SEN support (51), and Section 19 support (9). This reflects the diverse ways the team has provided assistance over the years.
 - Engagement is crucial, as these discussions involve official funding decisions. The Inclusion Hub is not a de-delegated service; instead, it will submit bids to the High Needs Block (HNB) for funding starting from September. This aligns with the broader need to review how inclusion funding is spent.
 - The Inclusion Hub currently holds reserves that could cover approximately three-quarters of a year and will continue to benefit those who have contributed (primarily primary schools). At present, only the Inclusion Hub can submit funding proposals, which will be reviewed annually. There are concerns about potential service reductions if bids are not approved and whether this will place additional pressure on the HNB. Improved communication is needed, as some headteachers were unaware of the process due to a lack of formal proposals.

The Forum noted the reports.

- **Aby added that the Inclusion hubs no longer de-delegation but will still exist, and they have a meeting 14th July with the Leads to discuss the new format. New proposal will be shared in September.**

67. Schools Forum Annual Report 2024/25 (Attached)

Detail

Since 2005/06, the Forum has produced an Annual Report, which is circulated to all schools via the Schools Portal and made available on the Forum website. A draft Forum Annual Report for 2024/25 was taken for consideration to the working group.

The working group:

Noted in 3.1 misspell of Formula

A copy of the final version of the 2024/25 Annual Report was provided for members

It was noted that the HNB and EYB also supported the publication of the report, The Forum ratified the working groups' recommendations.

68. SEND/HNB education capital strategy

Verbal update provided by Paul Turner



- Several presentations will be delivered regarding increased SEND capital funding, with projects planned for 2026/27 and 2027/28. Input is being sought on priorities and locations for provision types such as ASD and SEMH.
- Feedback is essential as plans will be submitted to Cabinet. Ongoing engagement and involvement in future planning are encouraged. A request will be made to share the presentation with the forum, and an email invitation will be sent out.
- Forum requested a copy of the Slides and have included as Appendix G
- *The working group noted the update*

The Forum noted the update.

69. Any Other Business

- LCC – Raise issue of deadline Supply: The importance of adhering to supply deadlines was raised, as these align with other key deadlines across LCC. A number of schools have missed the supply deadline, resulting in additional administrative workload and time that could have been better allocated. Schools are reminded to respect these timelines to support efficient operations.
- Schools Block Chair Update: It was announced that Steve Campbell will be stepping down as Chair of the Schools Block Working Group at the end of this academic year. A nomination for his replacement has been received. If no further nominations are submitted by 24th July, the new Chair will be formally confirmed at the Schools Forum meeting on 1st July.

The Forum noted the updates

7. Recommendations from the High Needs Block Working Group Detail

On 11 June 2025, the High Needs Working Group considered several reports. A summary of the information presented, and the Working Group's recommendations are provided below:

71. School Budget Outturn 2024/25

Please note item 7.1 was also presented at the Schools Block Working Group

The Working Group:

Noted The Report

Discussed:

- Budget and Funding Challenges: The budget remains under pressure, especially in the High Needs Block (HNB), which is based on outdated data and not reflective of current demand. Local provision is not expanding fast enough, leading to increased reliance on independent providers and scrutiny of their value.
- Operational and Administrative Issues: Delays in EHCP processing are causing backdated claims, with a catch-up process underway. Funding disparities between local authorities, like Birmingham's surplus despite a deficit, highlight systemic inconsistencies.

The Forum noted the information.



72. School Balances 2024/25

Please note item 7.2 was also presented at the Schools Block Working Group

The working group:

Noted the Report

Discussion:

- The prospect of monies come into school late in the Financial year, was noted that schools prepare and review 6 monitoring reports throughout the year so should always have a good understanding of what their position is and should know of funds awaiting to be received.
- It was noted that Inclusion Hub de-delegation was not included, Aby informed of the new proposed way Inclusion Hubs will be proposed to request funding from the High Needs Block. Discussions to be had with Inclusion Leads in July and Proposals should then be presented in Autumn Forum Meetings.

The Forum noted the information.

73. Clawback 2025/26

Please note item 7.3 was also presented at the Schools Block Working Group

The working group:

Noted the Report

Supported recommendation for option B) *Apply the clawback policy in 2025/26, but reducing the 12% CFR income threshold down to 8%*

Discussed:

- Schools, especially smaller ones, use funding limits as guidance and may retain emergency reserves to avoid clawback. Genuine exemption submissions are required by 31st October.
- Financial comparisons with academies are difficult due to limited public data, though reporting to the DfE is still expected.
- Schools typically rely on three-year forecasts to guide financial decisions, but emphasis should remain on the current year while monitoring future trends. Additional training for governors could help improve decision-making and ensure clearer long-term financial oversight.

The Forum ratified the working groups' recommendations.

74. Schools in Financial Difficulty Recovery Plan Bids

Please note item 7.4 was also presented at the Schools Block Working Group

The working group:

Noted the Update

Discussed:

For schools that did not actively engage, support continues to be offered in the same manner. However, it remains the responsibility of school leadership and governing bodies to ensure ongoing compliance and effective financial management.

The Forum noted the information.



75. Commissioned Place Process 2026/27

Detail

As part of the process agreed with the Schools Forum in 2020 and has continued through to 2025/26, an early notification was introduced as a guide to provide special schools and PRUs with an indicative number of commissioned places that the LA are forecasting at each school for 2026/27 academic year. The purpose of this is provide schools with an opportunity to have discussions and make any representations as appropriate with the inclusion service to discuss their commissioned places, however the final decision on the number of commissioned places is determined by the local authority.

A concern remains regarding the summer term census data only being available in July. Assuming census data is received in a timely manner in July, the LA are proposing to issue indicative commissioned places before the end of the summer term. If the census data is not available, the LA will look to issue early in September.

The additional place top up funding arrangements will continue to operate in 2026/27 for special schools, where the actual number of pupils at each redetermination is greater than the number of places commissioned on the budget forecast for pre-16 places, so a continued safety mechanism remains built into the system.

It should be noted however that **indicative places should only be used as a guide**. Final and confirmed commissioned places will be agreed following discussions with the inclusion service and finalised in the autumn term. This will then be incorporated in the school budget for the following financial year.

For PRUs, discussions will be held separately and will be led by the inclusion service, and as such the LA are proposing to not issue the usual indicative place letter.

Following discussions with members around the 2025/26 process, the views of the Working Group are now sought on the proposed High Needs Block indicative commissioned places process for 2026/27.

The working group:

Note the Report

Discussed:

Confirmed that Sapphire is the lead but unsure when discussion with settings will start with PRU's around places, funding etc.

The Forum noted the information.

76. Schools Forum Annual Report 2024/25 (Attached)

Please note item 7.6 was also presented at the Schools Block Working Group

The working group:

Thanked for the report, noted no issues

The Forum noted the information.



77. SEND/HNB education capital strategy

Verbal update from Aby Hardy

Please note item 7.7 was also presented at the Schools Block Working Group

The working group:

Thanked Aby for the Update

- Forum requested a copy of the Slides and have included as Appendix G

The Forum noted the information.

8. Recommendations from the Early Years Block Working Group

81. School Budget Outturn 2024/25 (Attached)

Please note item 8.1 was also presented at the Schools Block Working Group

The working group:

Noted the report

Discussed:

- It was confirmed that more reserves were used than initially planned, though not beyond overall expectations. Fluctuations in funding are expected to continue into the next financial year. A recent DfE notification outlines a proposed change to termly funding for 3- and 4-year-olds, aiming for greater accuracy, though implementation is not expected until 2026/27. A consultation paper is anticipated in the autumn term.
- It is anticipated that once the deficit is absorbed into the LCC budget, due to projected end of Statutory Override, increased scrutiny will follow. More so than already occurring.

The Forum noted the information.

82. School Balances 2024/25 (Attached)

Please note item 8.2 was also presented at the Schools Block Working Group

The working group:

Noted the report

Discussed:

- Concerns were raised about significant funds held by some secondary and special schools while pupils are being denied places. There is a lack of visibility around high balances in the context of inclusion.
- It was emphasized that schools with high balances should be held accountable, ensuring funds are used to support current pupils. A suggestion was made to consider including high-balance schools in the revised Red Book, alongside those with low or deficit balances.



The Forum noted the information.

83. Clawback 2024/25 (Attached)

Please note item 8.3 was also presented at the Schools Block Working Group

The working group:

Noted the Report

Supported recommendation for option B) *Apply the clawback policy in 2025/26, but reducing the 12% CFR income threshold down to 8%*

Discussed:

- It was acknowledged that while the proposal may not be well received by schools, it is considered necessary. There may also be a need to review and potentially raise the funding base level.

84. Schools in Financial Difficulty Recovery Plan Bids (Attached)

Please note item 7.4 was also presented at the Schools Block Working Group

The working group:

Noted the Report

Discussed:

- For schools that did not actively engage, support continues to be offered in the same manner. However, it remains the responsibility of school leadership and governing bodies to ensure ongoing compliance and effective financial management.
- Confirmed this aid is not planned to be repeated in the future
- Acknowledged the request to show updated data on these Schools next year, to review how well the concept worked.

The Forum ratified the working groups' recommendations.

85. Schools Forum Annual Report 2024/25 (Attached)

Please note item 7.6 was also presented at the Schools Block Working Group

The working group:

Noted no issues

The Forum noted the information.

86. Early Years Funding Arrangements 2026/27

Detail

The [early years operational guidance 2025/26](#) states that it is a requirement of all local authorities to pass through 96% of the funding rate received by the DfE to settings, with current guidance indicating that the minimum pass through rate will increase to 97% in 2026/27.



Currently and historically in Lancashire, the funding rate has been passed through to settings at 100% and no expenditure is held centrally as is allowed within the funding regulations.

Benchmarking to other local authorities shows that Lancashire are one of only three local authorities nationally that pass through 100% of the funding rate to settings.

Ahead of the 2026/27 financial year and budget setting that will take place in December 2025, modelling has been carried out using the 97% pass through to show the impact if the local authority proposed to hold a percentage of early years funding centrally in line with the regulations, which would require schools forum approval. For the purposes of the modelling, the central spend has been forecasted at £3m, which is split across the three entitlements.

3- to 4-year-old entitlement 2025/26 (102.91% Pass Through)

3/4 YO Pass Through (Excluding MNS)		
	£80,564,809	Base Rate Funding
	£1,317,894	IDACI Funding
	£1,250,000	SENIF
A	£83,132,703	Total Funding
B	£79,378	MNS Lump Sum (PFI)
C	14134177	Total Hours
C	£5.88	Average Funding Rate (A-B)/C
D	£5.71	DfE Funding Rate
D	102.91%	Pass Through (C/D)

Based on the DfE calculation of pass-through rate, for the 3- to 4-year-old entitlement, this shows the pass-through rate at 102.91% which is above the 96% required for 2025/26 and exceeds the funding rate received by the DfE.

3- to 4-year-old entitlement 2026/27 (101.16% Pass Through)

3/4 YO Pass Through (Excluding MNS)		
	£79,151,391	Base Rate Funding
	£1,317,894	IDACI Funding
	£1,250,000	SENIF



A	£81,719,286	Total Funding
B	£79,378	MNS Lump Sum (PFI)
C	14134177	Total Hours
C	£5.78	Average Funding Rate (A-B)/C
D	£5.71	DfE Funding Rate
D	101.16%	Pass Through (C/D)
	£1,355,211	Central Spend

Using the 97% pass through rate and distributing the £3m central spend across the three entitlements, modelling shows that the pass-through rate would forecast to be 101.16% which is above the 97% as is required within the regulations, and would be a reduction of c£0.10 on the 3-to 4-year-old base rate in 2026/27.

2-year-old entitlement 2025/26 (99.89% Pass Through)

2YO Pass Through		
	£49,193,843	Base Rate Funding
	£2,134,356	IDACI Funding
	£250,000	SENIF
A	£51,578,199	Total Funding
B	6594349	Total Hours
B	£7.82	Average Funding Rate (A/B)
C	£7.83	DfE Funding Rate
C	99.89%	Pass Through (B/C)

Based on the DfE calculation of pass-through rate, for the 2-year-old entitlement, this shows the pass-through rate at 99.89% which is above the 96% required for 2025/26.

2-year-old entitlement 2025/26 (98.49% Pass Through)

2YO Pass Through		
	£48,468,464	Base Rate Funding
	£2,134,356	IDACI Funding
	£250,000	SENIF



A	£50,852,821	Total Funding
B	6594349	Total Hours
B	£7.71	Average Funding Rate (A/B)
C	£7.83	DfE Funding Rate
C	98.49%	Pass Through (B/C)
	£771,143	Central Spend

Using the 97% pass through rate and distributing the £3m central spend across the three entitlements, modelling shows that the pass-through rate would forecast to be 98.49% which is above the forecasted 97% as is required within the regulations and would be a reduction of c£0.11 on the 2-year-old base rate in 2026/27.

Under 2-year-old entitlement 2025/26 (99.89% Pass Through)

Under 2YO Pass Through		
	£55,220,689	Base Rate Funding
	£2,109,311	IDACI Funding
	£150,000	SENIF
A	£57,480,000	Total Funding
B	5408491	Total Hours
B	£10.63	Average Funding Rate (A/B)
C	£10.63	DfE Funding Rate
C	99.98%	Pass Through (B/C)

Based on the DfE calculation of pass-through rate, for the Under 2-year-old entitlement, this shows the pass-through rate at 99.98% which is above the 96% required for 2025/26.

Under 2-year-old entitlement 2025/26 (98.49% Pass Through)

Under 2YO Pass Through		
	£54,355,331	Base Rate Funding
	£2,109,311	IDACI Funding
	£150,000	SENIF
A	£56,614,642	Total Funding
B	5408491	Total Hours



B	£10.47	Average Funding Rate (A/B)
C	£10.63	DfE Funding Rate
C	98.47%	Pass Through (B/C)
	£873,647	Central Spend

Using the 97% pass through rate and distributing the £3m central spend across the three entitlements, modelling shows that the pass-through rate would forecast to be 98.47% which is above the forecasted 97% as is required within the regulations and would be a reduction of c£0.16 on the Under 2-year-old base rate in 2026/27.

The modelling below also shows the average funding impact across the entitlements.

34YO	Funding Impact
Nursery School	£4,549
Nursery Class	£1,333
PVI	£2,402
Childminder	£157
Average	£1,438

2YO	Funding Impact
Nursery School	£1,491
Nursery Class	£324
PVI	£855
Childminder	£91
Average	£501

Under 2YO	Funding Impact
Nursery School	£595
Nursery Class	£304
PVI	£1,729
Childminder	£248
Average	£917

Summary	Funding Impact
Nursery School	£6,635
Nursery Class	£1,962
PVI	£4,986
Childminder	£496
Average	£2,856

The working group:



Noted the Report

Discussed:

- There is a possibility of being pushed by the DfE to make changes due to overall deficits.
- Although the pence-per-hour increase appears minor, it accumulates significantly, especially given the informal SEN support settings provide due to limited top-down funding.
- The sector is heavily impacted by rising National Insurance and minimum wage costs, which are not matched by funding increases, threatening sustainability. The new administration is reviewing budget lines closely, noting that this council does not fund from blocks as others do.
- A breakdown was requested to model the impact of moving certain teams under the block, estimated at around £1 million. Any changes would require consultation and forum approval due to the formula change. While the DSG deficit stems from another block, Early Years had a slight underspend, raising concerns about the fairness of impact, however it was stated that the EY block received support from other funding blocks within DSG in previous years.
- The group discussed the implications of removing supplementary hour funding or shifting to a termly model. Neither option is ideal, and modelling is needed to assess the impact of removing the supplement versus reducing the base rate.

The Forum noted the information.

Discussed

- A proposed 3% funding reduction could significantly impact EY settings, especially mid academic year.
- Sector-wide concern over sustainability, staffing, and support for children with additional needs.
- Officers clarified this is a proposal; final decisions depend on budget outcomes.
- Consultation will be shared in autumn; members urged to review and respond.
- Calls for better communication, more funding options, and advocacy through the Forum.

87. Autumn Interim Payments (Report from Mel Foster)

Details

Currently interim payments are calculated using the estimates hours submitted by providers or the previous terms actual hours if the provider fails to submit an estimate of hours.

Due to the number of overpayments that are being made as a result of providers not submitting an estimate of hours, we are proposing that the previous terms hours will no longer be used to calculate interim payments.

Therefore, for the autumn 2025 term onwards ALL providers must submit an estimate in order to receive an interim payment.



If the provider does not submit an estimate of hours the interim payment within the specific deadline, then the provider will not be paid an interim in the first month of term.

If the provider subsequently sends in an estimate of hours, it will be accepted however it will only be processed with the next month's interim payment (so in effect the provider will receive double).

The working group:

Noted the Report

Discussed:

- Prompt submission of estimated hours is essential to prevent overpayments and support financial efficiency, benefiting settings like primary schools.
- The move of payment dates from the 15th to the 7th has raised concerns, particularly among childminders who prefer payments in the first month. However, due to tight processing timelines, a shift to a payment window is being considered, and ad hoc payments will no longer be possible.

The Forum noted the information.

88. Local Authority Funding Agreement for the Provision of Early Education and Childcare (Report from Mel Foster)

Detail

Following the publication of the updated statutory guidance relating the charging rules, the draft Local Authority Funding Agreement has been updated to reflect the changes. These are not significant changes as the underlying legislation has not changed in that 'Free Early Education Entitlements' (FEEE) must be delivered 'free' without the need for parents to pay any additional charges if they choose not to. The current Local Authority Funding Agreement makes this clear as outlined in clause 15.

The charging section of the revised draft Local Authority Funding Agreement has just been updated to reflect the new wording in the statutory guidance and provide more clarity.

The intention was to publish the new Funding Agreement in May; however this has been postponed due to the current consultation that is being undertaken in relation the revised Ofsted Inspection Framework.

The Inspection Framework will move away from settings being given one overall judgement of Outstanding, Good, Requires Improvement and Inadequate and the proposal is that are proposing that settings will receive a separate judgement across 8 areas instead.

Currently if a setting receives an inadequate inspection result, early education funding is withdrawn at the re-inspection if the setting remains inadequate.



At this stage we do not know what the outcome of the consultation will be and how it will affect the quality section of the statutory guidance.

We cannot therefore finalise the revised Funding Agreement until the new inspection framework is published and we understand the impact it has on the funding rules.

The working group:

Noted the Report

Discussed:

- New funding is expected to be introduced around January 1st, depending on inspection timing and data release. Statutory guidance and DfE policy will influence how outcomes are judged, and parental agreements should already be in use.
- Settings must ensure claimed hours are attended, with accountability measures in place. While attendance is generally strong, policies should clearly define expectations.
- Some LAs, as noted by the Federation of Small Businesses, are auditing settings and reclaiming funding for early collections (e.g., 15 minutes). Current local guidance reflects statutory rules, including on artificial breaks.

The Forum noted the information.

89. Backdating EHCP Funding

Detail

Background

The Education, Health and Care needs assessment process is a statutory 20-week process. The SEND system nationally has witnessed an unprecedented rise in requests for Education, Health and Care needs assessments and consequently local authorities are having to deploy additional resources to mitigate the volume of requests.

In November 2024, Lancashire shared a process with schools detailing how band funding assigned to a final Education, Health and Care Plan (EHCP) would be backdated to the term at which it should have been funded, and no further than April 2024, however, there hadn't been an agreed process for early years settings to receive the relevant backdated funding.

Early Years Backdated Funding Process

As of May 2025, a process has been agreed to backdate EHCP band funding. Settings do not need to action anything. This process will be actioned by the local authority and will begin over summer and will be actioned accordingly.



Financial information

The payment will be calculated based on the number of weeks between the finalised EHCP and the 20-week date. Each payment will have £83 per week SEND Inclusion Funding deducted to avoid overpayment and will be currently calculated at 60% of the WPN.

Banding	WPN	Weekly payment for settings
E2	1.0	£36
E3	1.5	£79.20
E4	2.5	£165
E5	3.5	£250.80

The working group:

Noted the Report

Discussed:

- while processing is possible, it currently requires manual checks for each child due to the lack of a tracking mechanism. This is challenging given the high volume of children.
- Not all settings received Inclusion funding, resulting in some losses. A review process is underway, with a mechanism expected by September. Once available, the list will be worked through over the summer. If the mechanism is delayed, the standard process remains in place.
- Despite a 17-week delay, it was proposed to proceed with the current plans and address any issues as they arise.

The Forum noted the information.

90. SEND/HNB Update

Aby gave a verbal update

A series of and webinars are scheduled to explain the current planning approach, based on area data and projections. These were held on 17th June (9:30–11:00), 18th June (13:30–17:00), and 25th June (9:30–11:00).

The working group:

Noted the Update

Discussed:

- Attendees should have received an invite to discuss the plan.
- Sarah Jane is developing a 5-year capital strategy plan, and it would be beneficial for Early Years (EY) members to be involved.
- Meeting invite was requested and shared with the EY group.

The Forum noted the information.



91. Any Other Business

- **NDNA Case Study – Parental Complaint on Charges:**
A parent raised a complaint about a setting enforcing mandatory charges for consumables, which they believed should be optional. The setting refused the parent's request to opt out, prompting the issue to be escalated to the Local Authority (LA), which agreed with the parent, citing non-compliance with guidance. After further disagreement, the case was referred to the National Day Nurseries Association (NDNA). A supporting document from the LA was shared to clarify the relevant guidance. *Copy added as Appendix H*
- **Early Years Capital Expansion Programme:**
The first panel meeting for the Early Years Expansion Programme took place on Monday, with a strong emphasis on strict criteria and value for money (cost per place). Out of the applications received, 23 did not proceed to panel—some were deferred. If applications do not move forward, the next ones on the list will be considered. Notifications will be sent to both successful and deferred applicants.

The Forum noted the information.

9. Any Other Business

10. Date of Next Meeting

The next scheduled meeting of the Lancashire Schools Forum is arranged for 10.00 am 14 October 2025.

