Lancashire County Council - Lancashire Schools Forum
Thursday 15th October 2026, 10.00 am in the Savoy Suite, The Exchange, County Hall, Preston

Present

Primary School Governors
Stephen Booth *(LSF Vice-chair)*
Gerard Collins
Lesley Crook
Amy Holland
Paul James
Lindy King
Robert Waring
Sam Ud-din

Primary School Headteachers
Daniel Ballard *(LSF chair)*
Sarah Barton
Shelley Bennett
Jenny Birkin
Amanda Cronshaw
Kirsty Sutton
Anna Yates

Secondary School Governors
Janice Astley

Secondary School Headteachers
Sharon Hall
Andrew Cafferkey

Academy Representatives
John Davey
James Keulemans
Andrew Proctor

PVI Members
Sharon Fenton
Philippa Perks *(EY chair)*

Voting Substitutions
Hilary Sharples [PVI]

Short Stay Governor
Sharon Bennet

Short Stay Headteacher
Abigale Bowe

Special School Governor
Mandy Howarth

Special School Headteacher
Claire Thompson *(HNB chair)*

Nursery School Headteacher
Jan Holmes

Nursery School Governor
Thelma Cullen

Observers - Non-Voting Representatives
Ian Watkinson
Alison Daly
Rafeal Schiel
Paula Evans
Nicola Whyte
CC Matthew Slater
Lucy Bateson

Member of the Public
Andrew Murray
Audra McChrystal

Officers in Attendance
Steven Goodwin
Toni Rafferty
Gaby Gauthier
Millie Parkinson
Aby Hardy

1. Attendance and Apologies for Absence

Apologies were received from the following members:
Sapphire Murray, Paul Turner, Oliver Handley, Kate Walker, Ian Dickson, John Tarbox, Brian Rollo, Neil Gurman, Tracy Barton, Robert Waring, CC Andy Blake, Sarah McGladrigan, Carl Roscoe, Ivan Catlow, CC Joanne Ash

2. Substitute Members

Hilary Sharples attended as a substitute member for Sarah McGladrigan.

3. Minutes of the Last Meeting

The minutes of the last meeting held on 3 July 2026, were agreed as the correct record.

4. Matters Arising

There were no matters arising from the minutes of the meeting held on 3 July 2026 that are not covered elsewhere on the agenda.

5. Forum Membership

A report was presented outlining changes to Schools Forum membership since the previous meeting, including the annual review of membership, new appointments for the 2026/27 academic year, and current vacancies across several sectors. Members welcomed newly appointed representatives to their first meeting and noted opportunities for further nominations to vacant positions.

Members welcome Lucy Bateson as an observer to the meeting, who will be joining the authority shortly as the Schools Principal Accountant.

The Schools Forum:

a) **Noted the membership changes.**
b) **Welcomed new members to their first Schools Forum meeting.**
c) **Thanks to Claire Thompson, Kirsty Sutton and Caroline Morrison for their support to the Schools Forum.**

6. Schools Forum Arrangements including self-assessment

Steve Goodwin provided a verbal update outlining proposed changes to Schools Forum meetings and arrangements. It was proposed that the Early Years Block Working Group meeting scheduled for 26 November 2026 and the Schools Block Working Group meeting scheduled for 1 December 2026 be deferred until January 2027. This will enable the Local Authority to present the school funding information once the DSG settlement is announced in mid-December.

A Schools Forum self-assessment form is included within the meeting papers. Members are asked to complete and return the form to schoolsforum@lancashire.gov.uk.

The Schools Forum:

a) **Noted the update.**

Discussed:

- **The Chair confirmed the discussion was brought to the full forum to ensure transparency and member involvement.**

- **Members supported deferring the Early Years and Schools Block working groups until January on the basis that the meeting agendas will be separate for each meeting.**
- **Members raised that accountability data and funding information are still awaited from relevant services for Early Years.**
- **It was noted that a face-to-face meeting was the preferred option and meeting arrangements will be confirmed in due course.**

7. Experts at Hand

Aby Hardy provided a verbal update on proposals for a new SEND Cluster model, aimed at improving the coordination, consistency and accessibility of SEND support across Lancashire through the effective use of the Experts at Hand grant. The proposed model would strengthen early intervention, maximise the use of available resources, and provide a more equitable service through a combination of local district partnerships and central oversight.

Members were directed to the education bulletin and advised that a briefing session will be held on 21 October 2026, at which the proposals will be outlined in more detail.

Action: Millie to circulate the link to the briefing session to members once it has been received from the service.

The Schools Forum:

a) Noted the update.

Discussed:

- **An update was provided on the revised district inclusion model, due to launch at the end of October, with engagement sessions planned for November.**
- **Separate discussions will be held with the post-16 sector to ensure their needs are fully considered.**
- **Concerns were raised regarding future PRU funding; reassurance was provided that current proposals focus on a commissioning and outreach model rather than reducing provision. PRUs will remain schools and be included in decision-making arrangements.**

8. SEND Reform Plan Update

A verbal update was provided on the SEND Reform Plan, which has now been approved which confirms the LA will receive the High Needs Stability Grant. Members were advised that, while the plan has been endorsed, significant pressures and forecast deficits remain, and continued delivery of the plan is essential to secure ongoing funding and support. It was also noted that the Department for Education will continue to scrutinise progress and monitor implementation to ensure agreed actions are being delivered. The plan has been shared with members via the education bulletin.

Thanks were extended to all schools and members who contributed to its development.

The Schools Forum:

Noted the report.

9. Clawback Policy 2026/27

The revised School Balances and Clawback Policy for 2026/27 was presented to members for consideration.

Key changes include the introduction of a phased clawback approach, whereby no clawback will be applied in the first year that a school exceeds the surplus balance threshold. The revised policy also strengthens the requirement for schools to provide justification for excess balances and planned expenditure and broadens the exemption criteria to better reflect financial commitments and exceptional circumstances.

The revisions have been developed in response to feedback from schools and include a proposed exemption request submission deadline from 31 October to 30 April, a correction in the advance funding exemption from 7/12ths to 5/12ths, and the introduction of a standard pro-forma to improve the consistency of information submitted and reviewed. The policy also aims to provide greater support for schools holding excess balances.

It was noted that the Forum Chairs had expressed a preference for the deadline to be prior to year end at 31 January, rather than be extended to 30 April as proposed.

The Schools Forum:

a) Noted the update.

Discussed:

- **Members welcomed the proposed extension of the deadline to the end of January.**
- **Concerns were raised that exempting first-time cases from clawback could weaken the policy, it was agreed to remove this from the policy.**
- **Members requested that repeat cases should continue to be closely monitored.**
- **Schools will still be required to provide evidence to support excess balances and exemption requests where appropriate.**
- **Members reiterated that school funding should be spent on current pupils wherever possible, with surplus balances retained only for clear and justifiable purposes.**
- **Ongoing work to monitor school balances and support effective budget management was noted.**

A letter outlining the changes to the policy will be shared with maintained schools shortly.

10. Teachers' Pension Employer Contributions 2026/27

The Forum noted a report outlining the government's announcement that Teachers' Pension Scheme (TPS) employer contribution rates will reduce from 28.6% to 17.6% from April 2027. Members were advised that pension benefits will remain unchanged and that school funding will be adjusted nationally to reflect the reduced employer costs. The Forum also noted that funding adjustments for mainstream schools will be incorporated into the National Funding Formula and local funding formulae for 2027/28, with separate arrangements for special and short-stay schools.

The Schools Forum:

a) Noted the DfE update.

11. Feedback from the Early Years Block Working Group

The Forum received a summary of the meeting from the Chair and considered the recommendations of the Early Years Block Working Group meeting held on 15 September 2026.

The Schools Forum:

a) **Noted the Early Years Block Working Group feedback.**

Discussed:

- **Members discussion focused on the Early Years Funding Consultation.**
- **Members questioned the rationale for increasing central spend and sought assurance on the specific need and evidence supporting the proposal, particularly given feedback from the PVI sector.**
- **It was clarified that the proposal would fund existing staffing and statutory responsibilities rather than create new posts.**
- **Concerns were raised about the impact on providers through reduced funding, including potential financial pressures and staffing reductions within settings.**
- **The local authority acknowledged the sensitivity of the proposal and emphasised that the funding would support services already provided to the sector, including training, safeguarding, and administration of funding.**
- **Officers confirmed that the local authority can retain up to 3% of funding without Forum approval, with the Forum's role being to determine how retained funding is allocated.**
- **Members noted the importance of considering stakeholder feedback and survey responses ahead of the formal vote later in the meeting.**

12. Feedback from the Schools Block Working Group

The Forum received a summary of the meeting from the Chair and considered the recommendations of the Schools Block Working Group meeting held on 24 September 2026.

The Schools Forum:

a) **Noted the Schools Block Working Group feedback.**

13. Feedback from the High Needs Working Group

The Forum received a summary of the meeting from the Chair and considered the recommendations of the High Needs Block Working Group meeting held on 29 September 2026.

The Schools Forum:

a) **Noted the High Needs Block Working Group feedback and supported recommendations.**
b) **Ratified the working groups recommendation to support the Special School Clawback exemption request.**

14. Schools Block Funding Arrangements 2027/28

The Schools Forum considered the consultation responses around the schools funding arrangements and de-delegations. The analysis of responses was shared to members prior to the meeting once the consultation closed on 11th October 2026. Papers included an analysis of the consultation will be shared following the deadlines.

The Schools Forum:

a) **Members raised concerns around the low response rate for the consultation which is the lowest number of responses received in the past four years.**

Members considered the consultation responses and voted on the following:

Question 1: Do you agree with the continuation of the 0.50% transfer to the high needs block from schools block to assist with pressures facing the high needs block?

26	**Yes**
5	**No**
0	**Abstain**

Question 2: Do you agree that the Minimum Funding Guarantee (MFG) should be set at 0% for 2027/28, ensuring the highest level of protection available to schools through this funding factor?

29	**Yes**
0	**No**
0	**Abstain**

De-delegations

Question 3: Do you agree to the de-delegation option for Staff Costs - Public Duties/Suspensions in 2027/28 as outline above?

Primary	Secondary	
13	4	**Yes**
0	0	**No**
0	0	**Abstain**

Question 4: Do you support the de-delegation of the Heritage Learning Service (Museums Service) in 2026/27? (Primary Schools only)

Primary	
11	**Yes**
0	**No**
2	**Abstain**

15. Early Years Block Funding Arrangements 2027/28

The Schools Forum considered the consultation responses around Early Years Block Funding Arrangements 2027/28. The analysis of responses was shared to members prior to the meeting once the consultation closed on 11th October 2026. Papers included an analysis of the consultation will be shared following the deadlines.

The Schools Forum:

a) **Members raised concerns around the low response rate which is almost half the number of schools and settings compared to the previous years consultation.**
b) **Members discussed the low consultation response rate, noting concerns that perceptions of previous consultation outcomes may have influenced engagement. Suggestions were made to simplify future consultations to encourage participation.**
c) **Clarification was provided on funding retention arrangements and the Forum's role in determining how retained funding is allocated.**
d) **Members requested stronger accountability and performance information to support future decisions.**
e) **While proposals were broadly welcomed, concerns remained about the impact of funding reductions on hourly rates and providers.**
f) **Members noted that consultation responses can be influenced by external campaigns and communications.**

Vote Results:
Q2. Do you agree to utilise 1.00% to support Early Years central spend as outlined in the paper?

11	**Yes**
12	**No**
5	**Abstain**

The 1% central spend retention was not supported due largely to concerns about increased reductions to hourly rates when compared to the current financial year.

Q3. Do you agree to utilise 1.75% to support Early Years SEND as outlined in the paper?

11	**Yes**
12	**No**
6	**Abstain**

The 1.75% to support Early Years SEND was not supported due to concerns about the reduction of hourly rates funding to providers

Q4. Do you agree to the retention to be calculated on 2026/27 values, thus ensuring all providers receive any 2027/28 inflation in line with DfE funding announcements?

28	**Yes**
0	**No**
1	**Abstain**

The LA emphasised the support to the sector and positive outcomes that are already being delivered and will be enhanced through the centrally retained and SEND funding. The LA will review the outcome in line with the Schools Funding regulations and seek DfE and Secretary of State advice where necessary.

A letter outlining the outcome of the votes will be shared with schools and settings shortly.

16. Any Other Business

There were no items to note.

17. Date of Future Meetings

To note that the next scheduled Forum meeting will be held at 10.00 am on Thursday 14 January 2027. Arrangements for the meeting will be confirmed in due course.