SHROPSHIRE SCHOOLS FORUM

Paper A Minutes & Matters Arising Meeting Notes

Thursday 10 September 2026 | 8.30 am to 10.30 am

Microsoft Teams | Organiser: John Rowe

Purpose of these notes

A structured record of the main discussion, decisions and follow-up actions from the transcribed meeting. Attendance is based on people who identified themselves in the meeting chat or were clearly heard in the transcript.

1. Attendance and apologies

Attendance recorded

Name	Role / organisation
Bill Dowell	Chair
John Rowe	Local authority
Jo Morris	Officer support / meeting administration LA
Stephen Waters	Finance Business Partner, Children's Services, Shropshire Council
David Shaw	Director of Children's Services, Shropshire Council
Dan Steele	Shropshire Council
Richard “Richie” Williams	Shropshire Council
Roger Evans	Shropshire councillor
Jo Evans	TrustEd Schools
Sarah Finch	Marches Academy Trust
Sarah North	St Mary's CE Primary School, Empower Trust
Sarah Beard	Deputy Director of Education, Diocese of Hereford
Andrew Smith	Director, Finance and Client Services, Derwen College
James Staniforth	Shrewsbury College
Shelly Hurdley	Early Years, Explorers Childcare
Mark Cooper	Thomas Adams
James Pearson	TMBSS, Assistant Headteacher

Apologies reported

David O’Toole, Alison Ashley, Lisa Henshall, Rachel Williams, Caroline Clode and Andy Hall. John Hitchings was reported as a possible attendee but was on holiday and experiencing Wi-Fi difficulties.

Early departures noted in chat: Andrew Smith and Mark Cooper left for other meetings.

A manual analysis of attendance indicated that the meeting was quorate at 43% with 23 members and 10 in attendance.

2. Opening remarks and meeting protocol

John Rowe informed the Forum that Samantha Bradley had died during the summer following a long illness. He recognised her years of service to the Schools Forum, including agenda preparation, minute taking and support with school funding allocations. The Chair expressed condolences to her family, friends and colleagues.

- Members were asked to keep microphones muted when not speaking and to use the raise-hand function for substantive discussion.

- Members were asked to add their name and representative role to the meeting chat to support an accurate attendance record.
- The Council is exploring publication of recorded Schools Forum meetings on its YouTube channel.

3. Previous minutes and matters arising

The Forum reviewed follow-up items from the previous meeting. The SEND data dashboard was demonstrated as a current source of information on EHCPs, placements, attainment, suspensions, exclusions, post-16 data and vulnerable groups. The link is to be shared with Forum members.

- Review of the Forum constitution and terms of reference was confirmed as an agenda item.
- Maintained school balances were addressed under Paper B.
- No further matters were raised from the previous minutes.

4. Local SEND inclusion formula

John Rowe explained that the local authority needed to speak with the Department for Education before bringing detailed proposals to the Forum. Concerns included the financial position of the high needs block and the possibility that participation in a pilot could restrict future local flexibility, including block transfers.

- Sarah Court is to provide a briefing paper explaining the current position and the reason for prior discussion with the Department for Education.
- The matter will return to a later meeting when those discussions have taken place.

5. Maintained school balances, Paper B

Jo Morris presented the position for the 54 maintained schools. All maintained schools had submitted their budget plans by the end of June.

Forecast position	Schools
Surplus above 10% of income	21
Surplus between 2% and 10% of income	23
Below 2% of income, including deficit forecasts	10
Forecasting a deficit	2

Six schools had closed the previous financial year in deficit. The current budget plans forecast two schools in deficit. The aggregate maintained-school balance was stated as £3.5 million at March 2026, with £3.7 million forecast for March 2027.

- The local authority will continue support and challenge for schools with excess surplus balances and those with deficit balances.
- Schools with deficits must have robust recovery plans, with financial monitoring meetings arranged where necessary.
- A new SharePoint site is planned to launch on 1 October 2026 to improve communication, monitoring of finance committee activity and exchange of supporting information.

The Forum received and noted the report as part of its statutory responsibilities.

6. Dedicated Schools Grant monitoring, Paper D

Stephen Waters presented the first DSG monitoring report of the 2026/27 financial year, based on the forecast position at the end of August 2026.

Measure	Reported position
2026/27 forecast in-year DSG deficit	£36.922 million
Cumulative deficit brought forward from 2025/26	£46.646 million
Anticipated high needs stability grant	£41.090 million
Remaining brought-forward deficit after anticipated grant	£5.556 million
Forecast cumulative DSG deficit at March 2027	£42.479 million

The brought-forward deficit increased by £991,000 because the final 2025/26 early years block allocation was lower than the provisional allocation. The forecast in-year deficit relates almost entirely to the high needs block.

Key high needs pressures

Area	Forecast / pressure
Mainstream top-up funding and SEND hubs	£12.662 million overspend; forecast spend had risen substantially compared with 2022/23.
Local authority special schools and TMBSS	£7.622 million overspend, including the effect of revised banding and grants rolled into the high needs block.
Independent special schools and related provision	£29.348 million forecast expenditure and £12.132 million overspend. This line also includes independent SEND nursery placements, education contributions to joint-funded placements and independent alternative provision.
Post-16 further education and colleges	£2.689 million overspend against a £2.159 million budget, influenced by continuing high-cost specialist placements.

Funding and reform context

- The 2026/27 high needs DSG allocation was reported as £48.916 million, with a further £1.137 million transferred from the schools block following the Forum's earlier decision on a transfer of up to 0.5%.
- Shropshire was reported as the 18th worst-funded local authority for high needs DSG per pupil in an F40 report covering 151 local authorities.
- The statutory override for DSG deficits is in place until March 2028.
- The Council has prepared a local SEND reform plan as a condition of the high needs stability grant and is completing quarterly data and financial returns with the Department for Education.
- An Experts at Hand SEND transformation grant of £1.944 million was reported for 2026/27, aimed at strengthening mainstream settings through earlier support and improved access to relevant professionals.

Discussion

Members discussed the need for more detailed modelling of mitigations, including additional SEND hubs, the Experts at Hand programme and cost avoidance. The next quarterly submission was stated to be due on 30 October 2026. The Forum asked to see the full local SEND reform plan and appendices so that members could understand forecast placement numbers, unit costs and wider impacts, including SEND transport.

John Rowe described work with Wakefield local authority and local multi-academy trust leaders to strengthen sufficiency planning and identify provision gaps. Members also emphasised the continuing need to press for fairer national funding and to explain Shropshire's rural context to MPs, ministers and Department for Education officials.

7. Chair and Deputy Chair

- Bill Dowell agreed to continue as Chair during the period of transition and review.
- John Hitchings had indicated that he was willing to continue as Deputy Chair.

No alternative nominations were raised, and the Forum agreed to proceed on that basis.

8. Constitution, terms of reference and membership

John Rowe and Jo Morris outlined the need to refresh the Forum's constitution and terms of reference so they more clearly describe the Forum's role, governance arrangements, membership, nomination processes and expectations of representatives.

- Jo Morris had circulated an initial draft terms of reference and a membership list. Members were asked to review both and confirm that their title, organisation or multi-academy trust details were correct.
- Number-on-roll information will be added to the membership review to test whether representation is fair across phases.
- A time-limited working group of around six members will review the documents using the Department for Education self-evaluation checklist and operational guidance.
- The group should include representation from across the sector. Sarah North volunteered in the meeting chat. James Pearson and Shelly Hurdley were also invited to participate.
- A revised draft is to be brought to the next Forum meeting.

9. Maintained headteacher vacancies

Three maintained-school headteacher representatives had left at the end of the summer term, and three nominations had been received. In the absence of a clearer constitutional process, the Forum agreed to continue with its established approach and accept the nominations through the Forum.

- Jo Morris will contact the nominees and invite them to the next meeting.
- The nominees will also be asked whether they wish to join the constitution and terms of reference working group.

10. Work programme and communications

The circulated work programme was noted as a developing document. Members were invited to suggest additions or amendments. The programme and the expected meeting-by-meeting cycle will be considered alongside the constitution review.

John Rowe reported a recent meeting with Julia Buckley MP, together with Greg Boardman of TMBSS, where Shropshire's funding pressures and rural challenges were raised. David Shaw confirmed that cross-party MP briefings continue and agreed to coordinate a future update when there is useful information on DSG settlements and national policy changes.

11. Future meeting format and next meeting

Members reflected that the meeting had been quieter than usual and was largely local-authority led. A face-to-face or hybrid session was proposed to rebuild relationships and encourage more active school and college participation.

- John Rowe and Jo Morris will explore a suitable Shrewsbury venue, including the possibility of The Lantern, for the next meeting.
- The next meeting was stated as Thursday 12 November 2026 at 8.30 am.

Action summary

No.	Action	Owner	Timing / status
1	Share the finalised SEND data dashboard link with Forum members.	John Rowe	After the meeting
2	Provide a briefing paper on the local SEND inclusion formula and engagement with the Department for Education.	Sarah Court	For a future meeting
3	Continue monitoring and support for schools with surplus or deficit balances; launch the maintained-schools SharePoint site.	Local authority finance team	SharePoint planned for 1 October 2026
4	Complete detailed modelling of SEND reform mitigations and reflect this in future DSG monitoring.	Stephen Waters and SEND colleagues	Quarterly return stated as due 30 October 2026
5	Provide the local SEND reform plan and appendices to the Forum.	Local authority officers	Future Forum business
6	Circulate a working-group date and seek balanced sector representation.	Jo Morris / John Rowe	Before the next meeting
7	Review the draft terms of reference and membership list; confirm details and submit comments.	All Forum members	Before working-group review
8	Populate number-on-roll information and analyse representation across phases.	Jo Morris	As part of membership review
9	Contact the three maintained headteacher nominees and invite them to the next meeting and working group.	Jo Morris	Before the next meeting
10	Coordinate a future briefing for Shropshire MPs.	David Shaw	Next suitable opportunity
11	Explore a Shrewsbury venue and hybrid arrangements for 12 November.	John Rowe / Jo Morris	Before the next meeting

Record note

These notes summarise the transcribed discussion and meeting chat. They are not a verbatim transcript. Names and roles in the attendance section are limited to those explicitly identified in the available meeting record.