

Worcestershire Schools Forum (WSF) Agenda 9 October 2025

3.00 pm to 5.00 pm

Remote Meeting

Via MS Teams invite

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Contact: Rob Phillips

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Date of next programmed WSF meeting

27 November 2025 at 2 PM Via Teams

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worcestershire county council

Minutes of the Meeting of the Worcestershire Schools Forum (WSF)

Wednesday 15 January 2025
Remote Meeting Held Via MS Teams

The meeting started at 3.00 PM.

In Attendance:

a. WSF Members

Edward Francis (Vice Chair) [EF]	- Headteacher Fort Royal Special School
Malcolm Richards (Chair) [MR]	- Governor, Bromsgrove
Phil Hanson [PH]	- Headteacher Pershore High School
Vivek Shah [VS]	- Nursery Owner
Annette Summers [AS]	- Nursery Owner
David Butler [DB]	- Principle Tudor Grange (Worcester)
Tim Reid	- Executive Diocesan Director of Education for the The Diocese of Hereford and Diocese of Worcester
Elizabeth Dixon	- Headteacher Franche Primary

b. Local Authority (LA)

Phil Rook	- Chief Financial Officer, Worcestershire County Council
Sarah Wilkins [SW]	- Assistant Director Education, Early Years, Inclusion and Pupil Place Planning
Holly Hancock [HH]	- Senior Finance Business Partner, Worcestershire County Council
Rob Phillips [RP]	- Finance Business Partner - Schools - Worcestershire County Council

1. Apologies

Councillor David Chambers (DC)	- Cabinet Member with Responsibility for Education, Worcestershire County Council
Steph Simcox [SS]	- Deputy Chief Financial Officer, Worcestershire County Council
Marie Pearse [MP]	- Headteacher Evesham Nursery School
Daniela Carson [DCa]	- Assistant Director for All Age Disability (0 – 25) – Worcestershire County Council
Nicky Burford [NB]	- Early Years and Childcare Sufficiency and Improvement Lead – Worcestershire County Council

2. Declaration of Interests

None

3. Declaration of Potential Conflict of Interests with Items on the Agenda

None

4. Minutes of the Last Meeting (11 December 2024)

Minutes agreed.

5. Matters Arising from The Minutes

None

6. Cabinet Decision

RP presented the agenda paper to WSF. That the funding formula would be going to the Cabinet meeting on 16 January, later than normal due to not having any actual funding rates and information until later in the funding cycle due to the General Election.

This also confirms the previous decision in December confirming the 0.5% of school block to the high needs block, with us trying to keep to the NFF as much as possible, the only change will be the next item on amounts.

PR gave an update on the public account body report, and work done by the F40 is showing that the funding system for SEND is still not viable at present. The Government have committed to change but this and other reports are clear it needs to be done quickly. Some of the things already started including DBV and Change Programme which WCC are already involved in.

Councils are still waiting for confirmation on the statutory override, if this is going to continue after March 2026 or will end.

7. Schools Block Allocation 2025/26

RP presented 3 options for the forum to decide which is their preferred option as the funding received for the School Block is insufficient to fund the National Funding Formula in its completeness. The total spend to meet the NFF would be £454,507,380, this is £3,530,319 more than the school block allocations.

The transfer of £2,283,957 is part of this but £1,246,362 would still have needed to be recouped even if this had not been agreed.

Option 1 is to reduce the AWPU by £48 for each type, setting the Minimum Funding Guarantee to the minimum (-0.5%), a capping of 0.13% on a 50% Scaling, and reducing the pupil growth by 12.29%

Option 2 is to reduce the AWPU by £73 for each type, setting the Minimum Funding Guarantee to the minimum (-0.5%), and no capping or Scaling, and reducing the pupil growth by 2.08%

Option 3 is to reduce the AWPU by £45 for each type, setting the Minimum Funding Guarantee to the minimum (-0.5%), a capping of 0.55% on a 100% Scaling, and reducing the pupil growth by 12.32%

It was confirmed that schools would still receive the funding floor where necessary.

WSF agreed unanimously for option 3 to be taken forward.

8. Provisional Schools Funding Settlement

RP presented the report showing fewer pupils in primary school and increase in in secondary, which is due to the previous high numbers working through the system.

The DSG has increased by about 7% but a large amount of this was previous grant so the actual increase is only about 2%.

The central block has increased this is due to the prior year grants for teaching staff and the increase in Copyright Licences has been partly funded. Historic commitments have decreased by 20% again this year.

High needs block has increased by about 2.28% increase, with special schools receiving the same grant as last year for teacher pay, for example.

The question was asked about where in the falling rolls in schools, SW explained some area are going down with other increasing and suggested that member maybe interested in the education sufficient reports going to February cabinet.

9. Free School Meals Auto-Enrolment

SW presented the briefing paper, around this item. It was felt to be a good idea but understood that it maybe hard at present with the council and district councils but wanted the thoughts of WSF

It was agreed that it would be good for the council to push this within the briefing to local MPs. It would be better for it to be automatically rather than an opt in and be an opt out.

10. Early Years – Funding Rates

RP presented the briefing paper to WSF. He confirmed that these rates were produced based on the agreement ratified by WSF last year. It was confirmed that this was the full early years, sector.

The National Insurance Contributions was a concern of WSF with this increase and also the increase in National Minimum Wage that these rate increases did not go far enough. SW to add this to the local MPs briefing.

11. Any other business

a. SRMA Mentoring Program

RP confirmed that as part of WCC work with the Department for Education Schools Resource Management Advisors, they are now opening up that school staff can receive mentoring, for no cost. It was confirmed that all Worcestershire schools would be informed of this, through SW weekly bulletin.

b. Time and dates of future meetings

The local authority officers are asking if it would be possible to move from a Thursday due to other meetings.

MR suggested that we remain as is for the present time.

ED if consideration of the time could be taken around the school day.

c. Local authority Government Reorganisation and Financial Position

The budget is going forward to the council at present, with high pressures within adult services, children's social care and home-to-school transport, the local authority is struggling to set a balanced budget. With also the increase in cost for NIC and National Minimum Wage will influence the local authority, due to the supplier passing this cost on without additional grant to cover this. The funding remains are around the same but the demand for these services is increasing.

For example, when the local authority received a new social care grant of about £1.7 million but we overspent by £10 million on children's. We have had other grants cut, and we did not get any of the new grant which replaced these.

PR has had to apply for Exceptional Financial Support to buy the council time, which is not something taken lightly. With we believe, around, another 17 other local authorities doing the same.

PR then covered the Local Authority Government Reorganisation through devolution in its white papers; they are looking at all councils being a unitary by either 1 April 2027 or April 2028. Worcestershire have responded by the deadline of the 10 January to not hold elections in May 2025.

The overall decision for councils will be made by the government not the local authority on the way forward with councils needing to put forward their suggested option.

It was agreed to keep this on the agenda for WSF on progress and the way forward.

d. Breakfast Club

SW confirmed that Worcestershire had 10 Schools that had been accepted onto the pilot for this. With the LA feeding back to WSF at the next meeting on the pilots and how it is working. We are also mindful of how this will affect school and other sectors involved in wraparound provision.

Meeting ended.

The meeting closed at 16.04 PM.

Date of next meeting

TBC due to agenda item 11 b.

DRAFT

Report to the Worcestershire Schools Forum (WSF) Cabinet

1. Purpose

- 1.1 To update WSF with the latest decision made by Cabinet or Council Member with Responsibility (CMR).
- 1.2 To update WSF on the decision to be made by Cabinet or Council Member with Responsibility (CMR).
- 1.3 Financial position of the Council.

2. Links to the Meeting Information

- a. Financial position reported to Cabinet
- b. Education Sufficiency Annual Update February 2025
 - [6. Sufficiency Place Planning Final v1.0.pdf](#)
 - [6. Appendix 1 Autumn 2024 Childcare Sufficiency Assessment Final v2.pdf](#)
 - [6. Appendix 1A District Ward maps of Sufficiency of Nursery Education Funded provision](#)
 - [6. Appendix 2 Mainstream incl post-16 Sufficiency Report 2024 Final v1.0.pdf](#)
 - [6. Appendix 3 SEND Sufficiency Report 2024 Final V1.0.pdf](#)
 - [6. Appendix 4 - Bromsgrove High forecast demand v1.pdf](#)
 - [6. Appendix 5 - Worcester City Secondary forecast demand v1.pdf](#)
 - [6. Appendix 6 - WCS Capital Costs Forecast 22 Jan 2025.pdf](#)
 - [Joint Impact Assessment Project Screening PDF](#)
- c. Review of Education Obligations (S106) Policy February 2025
 - [7. Education Planning Obligations \(S106\) Cabinet Report v1.0.pdf](#)
 - [7. Appendix 1 Worcestershire EPOP 2025 - rewrite V5](#)
 - [7. Appendix 2 WCC Pupil Yield Review Evidence findings v1.0.pdf](#)
 - [Appendix 3 Worked example of Contributions](#)
 - [Joint Impact Assessment Project Screening PDF](#)
 - [Equality Public Health Full Impact Assessment PDF](#)
- d. Worcester City Secondary School Update July 2025
 - [4 Worcester City Secondary Sufficiency for Cabinet final draft.pdf](#)
 - [4 Appendix 1 - Worcester City Secondary forecast demand v1 for Cabinet.pdf](#)
 - [4 Appendix 2a Feasibility Reports.pdf](#)
 - [4 Appendix 2b Feasibility Reports.pdf](#)
 - [4 Appendix 2c Feasibility Reports.pdf](#)
 - [4 Appendix 2d Feasibility Reports.pdf](#)
 - [4 Appendix 2e Feasibility Reports.pdf](#)
 - [4 Appendix 2f Feasibility Reports.pdf](#)
 - [4 Appendix 3 Existing school expansion options and preferences v1 for Cabinet.pdf](#)
 - [4 Appendix 4 Worcester City Sufficiency Capital Programme June 2025 v1 for Cabinet.pdf](#)
 - [Joint Impact Assessment Project Screening PDF](#)
 - [Equality Public Health Full Impact Assessment PDF](#)
 - [Environmental Sustainability Full Impact Assessment PDF](#)
- e. WCC Cabinet Forward Plan

4. Recommendation

4.1 The WSF notes and discuss.

Rob Phillips
Finance Business Partner - Schools
Worcestershire County Council
October 2025

Worcestershire Schools Forum

New Schools Update

Primary/First School (Mainstream):

- Worcestershire Model developed for new Primary and First Schools required due to housing development across Worcestershire (2027 to 2035)
- Timeline for delivery of schools based on housing buildout rates and pupil forecast trajectory
- Funded through s106 and Basic Need

Foxlydiate First School

- First of the pipeline schools to be required, Worcestershire Model developed to Foxlydiate site constraints
- Rivers CofE Trust appointed following competition, now working with WCC on the next phase of design
- Planning pre-application submitted to Bromsgrove Council
- Anticipated start on site September 2026
- Completion of construction works end 2027
- Proposed school opening 2028 based on current trajectory

New Schools Update

Enterprise Academy (SEND):

- New ASD (Autism Spectrum Disorder) Free School is being designed, delivered and funded by DfE
- MacIntyre Academy Trust appointed to run the school and working with the DfE on design
- WCC to provide the site – Poolbrook site identified
- WCC to cover the cost of abnormalities, including demolition
- Delivery for September 2027 (original date September 2026)
- Agreement for WCC to deliver the demolition element in order for the programme to remain on track and not slip to September 2028 delivery.
- Agreement for WCC to fund future proofing of the large spaces of the building for an additional 42 children to meet forecasting needs.

Timeline/next steps:

- DfE Feasibility Study final presentation to the Trust summer 2025
- DfE design feasibility complete, currently under review awaiting sign off to progress to next stage
- DfE procurement of main contractor to develop design ahead of planning application Autumn 2025 (tbc)
- WCC to ensure vacant site (October 2025) ahead of demolition of current buildings – December 2025 (tbc)



High Needs

Dedicated Schools Grant

Deficit Management Plan

2024/25 onwards

Version	Date	Initials
1.1	15.8.25	JK
1.2	15.8.25	JK
1.3	19.8.25	AJ
1.4	21.8.25	AJ
1.5	10.9.25	JK

High Needs Trends- Budget Monitoring

The DSG budget forecasts an overspend of £86.200m against a total budget allocation of £291.801m. The overspend is largely contained within the High Needs block of the DSG.

The accumulated deficit position for the DSG reserve as of 1 April 2025 is reported as a deficit balance of £98.2m, built up from previous years overspends. Considering the current forecast for 2025/26 the deficit balance is expected to increase to £184.4m at year-end as shown in **Table 1**. In P3, the early projection of a 20% increase in spend has been amended based on the actual spend to date.

Table 1 – Forecast DSG Position

Summary Position for Dedicated Schools Grant	
	£m
Restated Accumulated Deficit 1 April 2025	98.2
High Needs Deficit 2025/26	86.3
Projected Early Years and Schools Block	-0.1
Savings on Other Blocks	0.0
Accumulated Deficit 31 March 2026	184.4
Projected Early Years and Schools Block	0.0
Projected High Needs Shortfall 2026/27 **	117.7
Projected Accumulated Deficit 31 March 2027	302.1

Currently the High Needs deficit does not impact on the council's financial sustainability, as the deficit sits as a negative unusable reserve on the balance sheet permitted via a statutory instrument. The temporary statutory override was initially in place until March 2026 but has recently been extended until March 2028 to ringfence DSG deficits from councils' wider financial position in their statutory accounts. The problem remains on how to solve the historical deficit for SEND and High Needs from the end of March 2028, which could directly impact the Council's financial position, increasing funding pressures. This is not a Worcestershire County Council issue in isolation and is a major concern amongst local authorities nationally.

Overview of data trends

The number of EHCNAs increased significantly from 1,142 in 2022 to 1,883 in 2024. With monthly average increasing from 95 to 157 respectively. For 2025 to June end there have been 1,009, a monthly average of 168, with yearly forecast of 2,018.

In 2025 a total of 1,025 new EHC plans were issued to children and young people residing in the local area.

The proportion of children and young people aged 0-25 with an ECHP has increased from 2.74% in 2022 to 4.19% in 2025. This compares with England from 2.84% to 3.77% over the same period.

Speech, language and communication needs account for 37.4% of all EHCPs compared with 25.7% for England in the 0-25 age group. Social, emotional and mental health accounts for 19.4% of EHCPs compared to 23.6% for England.

Table 2 – SEN2 Snapshot in January from 2019 to 2025 with % increase

SEN2 Snapshot (January)	Worcestershire	England	England LA Average	West Midlands Average
2019	3,502	353,995	2,329	2,826
2020	4,053	390,109	2,567	2,993
2021	4,182	430,697	2,834	3,295
2022	4,555	473,255	3,114	3,536
2023	4,904	517,048	3,401	3,785
2024	5,945	576,474	3,695	4,254
2025	6,970	638,745	4,202	4,765
% increase in numbers 2019- 2025	99%	80%	80%	69%

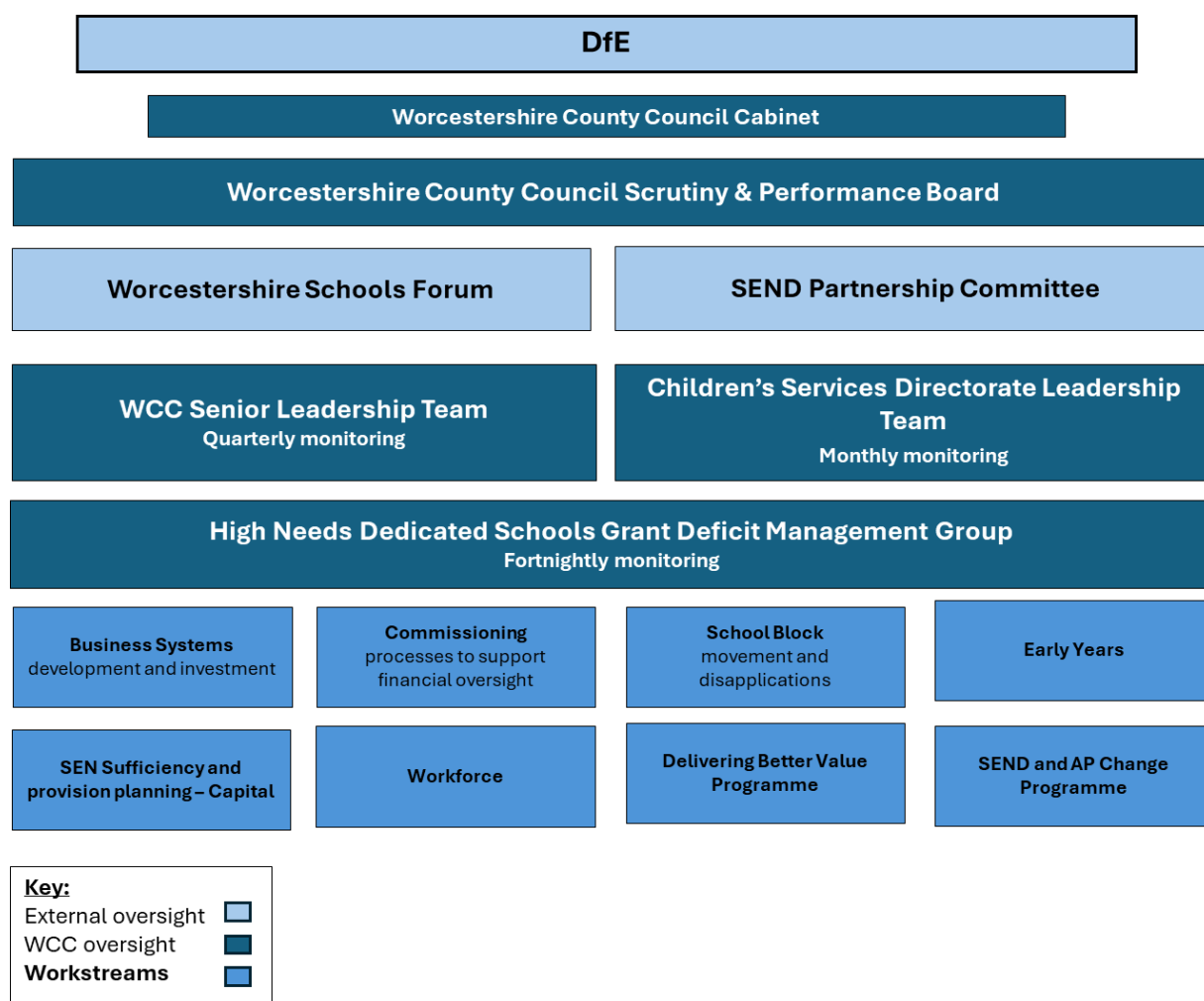
England average based on 152 Local Authorities

West Midlands average based on 14 Local Authorities

All data is based on January DfE SEN2 data collection

High Needs Deficit Governance

The below diagram shows the governance structure for the High Needs Deficit Management Plan. Cost control activity workstreams are managed by a fortnightly High Needs Dedicated Schools Grant Deficit Management Group, overseen by and linking into existing WCC governance groups including Senior Leadership and Directorate Leadership Teams, Scrutiny and Performance Board and Cabinet. Partnerships including Worcestershire Schools Forum and SEND Partnership Committee



Key officers regularly review the High Needs Deficit Management Plan. High Needs Deficit Management Group chaired by DCS and attended by Assistant Director for Education, Early

Years, Inclusion and Place Planning, Assistant Director for SEND and All Age Disability, Chief Finance Officer and Senior Business Partners.

High Needs Deficit Management Group meets on a fortnightly basis to review impact and outcomes of identified measures to contain spend and strategies to maximise cost avoidance in addition to business as usual within Children's Services.

Cost Control Activity Workstreams

The workstreams are:

- 1) Business Systems – Development and Investment
- 2) Commissioning – processes to support cost control
- 3) Schools Block movement and disapplications
- 4) Early Years
- 5) Workforce
- 6) Delivering Better Value Programme
- 7) SEND and AP Change Programme
- 8) SEN Sufficiency and Provision Planning – Capital

Each workstream covers specific areas of focus with specific activities outlined including anticipated impact, owner and timeline as shown in the below section.

Workstream 1: Business Systems – Development and Investment

Area of Focus	Activity	Impact- Outcome for Children	Impact- Cost Control	Owner	Timeline
Processing SEND payments via ContrOCC	Integrating processing of payments into the children's records system	Consistent accurate and timely payments to providers will be achieved. Accurate data reporting and forecasting facilitated. Reduced administrative burden will allow staff to focus on commissioning activities and achieving better value. Eliminate costs associated with failure demand.		Daniela Carson	Independent settings – completed September 2025 Mainstream and Academies – to be completed April 2026
Implementation of EYES (Early Years & Education System)	Council investment in an integrated recording system for all children's education records.	All records in one place, reduced administrative burden of data entry and improvement in data quality		Emma Brittain	To be completed July 2026

Workstream 2: Commissioning – Processes to support Cost Control

Area of Focus	Activity	Impact- outcome for Children	Impact- Cost Control	Owner	Timeline
Involvement in Regional work addressing placement costs from providers	Creation and implementation of DPS (Dynamic Purchasing System) for Alternative Provision placements.	Increased control on the cost and quality of AP placements.	Cost avoidance achieved 24/25- £347K Financial year to date: £506K Unregistered Alternative Provision Directory (DPS) Worcestershire County Council	Phil Rook	In place from September 2023. Work to further streamline DPS processes ongoing to avoid delays caused by capacity in the Commissioning team, some spot purchasing still necessary to meet immediate needs.
Provision for sensory impaired children and expensive specialist placements.	Recruitment of in-house BSL and Braille trained Teaching Assistants to directly support EHCP provision in mainstream schools.	Children have good quality TA provision from the start of their schooling; needs can be met in local mainstream school rather than travelling to high-cost specialist setting.		Daniela Carson	Ongoing
Early Years specialist language provision.	To review and partially redesign the specialist language provision for EY children.	Better use of placements; current in-year saving: £46k, cost reduction for 25-26- £80K		Sarah Wilkins	Commenced September 2025, to be reviewed September 2026
SEND Placement Decision Making	Bi-weekly panel, responsible for scrutiny of all requests for high-cost placements in specialist settings.	Value for money scrutiny of all independent placements against needs as identified in Section F of the child's EHCP. High-cost independent provision is only funded for those children that need it.		Daniela Carson	Ongoing
CCAS Panel (Children who Cannot Attend School)	Multi-agency panel weekly meeting that includes schools to agree support and intervention for children that may not be able to school -	Control over Section 19 costs to the HN budget, ensures and improves school level practice. Reduces risk of Section 19 threshold being met and avoids costs along		Sarah Wilkins	Ongoing

Area of Focus	Activity	Impact- outcome for Children	Impact- Cost Control	Owner	Timeline
	collaborates to limit and prevent absence due to health and social /emotional reasons and agrees section 19 thresholds	with brokering health interventions. This process has received WM Team of the Year Award (DfE supported) and is noted as leading practice and being shared with other LA's			

Workstream 3: Schools Block movement and disapplications

Area of Focus	Activity	Impact- Outcome for Children	Impact- Cost Control	Owner	Timeline
Transfer of 0.5% of Schools Block funding to High Needs Block	Decision made by Worcestershire Schools Forum to transfer 0.5% of funding for the financial year 2025/26	Increase to High Needs Block funding of £2.2 million		Phil Rook	Ongoing- annual basis to be reviewed at Schools Forum then to Cabinet

Workstream 4: Early Years

Area of Focus	Activity	Impact- Outcome for Children	Impact- Cost Control	Owner	Timeline
Inclusion Funding for Early Years Settings	Review and changes to banding to meet needs	Estimated reduction of spend by £0.5m predicted for 26/27 Simplified process with greater focus on funding to meet complex need		Sarah Wilkins	Implementation April 2026

Nursery funding for Early Years children who cannot access their full entitlement in a mainstream setting	Using EY main block to fund nursery support for those children	Provision of the right level of support for children from the correct funding stream.		Sarah Wilkins	Ongoing
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Workstream 5: Workforce

Area of Focus	Activity	Impact- Outcome for Children	Impact- Cost Control	Owner	Timeline
Reducing and avoiding permanent school exclusions	Training, guidance and support for the education workforce across the LA and in schools to proactively prevent exclusion Inclusion in Educational Settings Worcestershire County Council	Reduction of the burden to the High Needs Block incurred under the LAs Section 19 duty to provide education for all permanently excluded children. Cost per permanent exclusion: £26,850 for each pupil. End of 24/25 academic year total of 124 PX - rate of all children = 0.17% End of 23/24 academic year total of 149 PX - rate of all children 0.17% WM comparisons of 14 LA's for 2023/24 data - 2024/25 data not published Worcs had the 3rd lowest rate of suspension in the WM Worcs was above the WM average - 7th/14 for suspensions for children with EHCP's Worcs had the 3rd lowest rate for suspension of children with No SEND - lower is better	Suspension of children at secondary schools - well below the WM average Permanent exclusion Worcs 4th lowest rate of PX for children in WM - below WM average Worcs was above WM average for PX of children with EHCP 5th / 14 Worcs was 5th lowest for PX of children with SEND - below WM average PX at secondary schools well below WM average	Sarah Wilkins	Ongoing

Workstream 6: Delivering Better Value Programme

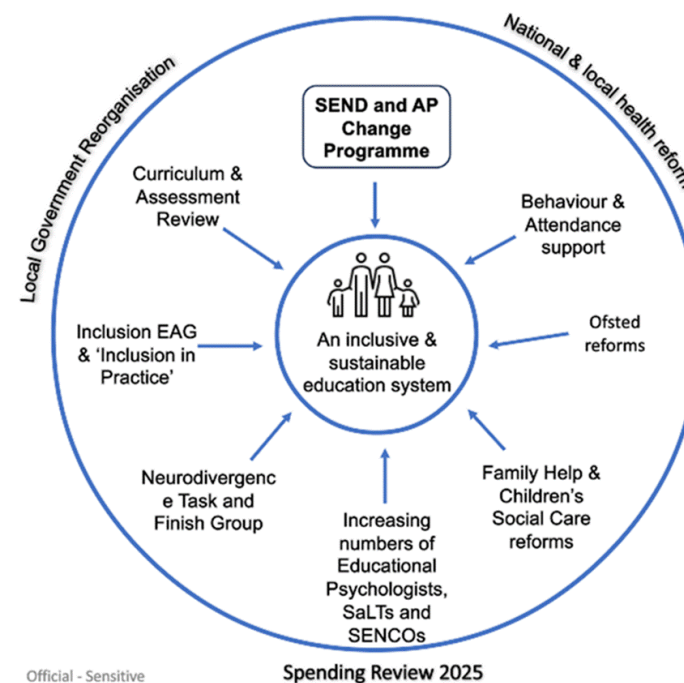
Area of Focus	Activity	Impact- Outcome for Children	Impact- Cost Control	Owner	Timeline
Early Years to Primary School	Redesign of identification and assessment process for Early Years children	Identification of children's years at the earliest opportunity to ensure the right support is in place at the right time; this will avoid escalation of needs to a critical point at a later stage.		Dr Louise Oland	Completed August 2025
Primary to Secondary School Transition	Improving service delivery and standardisation or transition guidance.	An increased number of schools that have actively improved the transition process for children with SEN. This has led to a reduction in suspensions.		Lisa Bradbury	Completed August 2025
Transition from Secondary to Post-16 Education	Review of all EHCPs for young people aged 16 and over, cessation where appropriate and ensuring those that are required are delivered at a level to meet need, eliminating over-delivery.	£3 million full year cost avoidance Over 400 EHCPs were considered for cessation before the end of the financial year 24/25, this is now embedded in practice and will continue year on year.		Daniela Carson	Completed August 2025

Workstream 7: SEND and AP Change Programme

Area of Focus	Activity	Impact- Outcome for Children	Impact- Cost Control	Owner	Timeline
Using development opportunities and grant funding to test sustainable, effective for children and best value approaches to support children and families earlier, achieve better outcomes for children and reduce pressures on specialist services and costs.	<p>Outreach from AP schools to support mainstream to prevent exclusion, promote inclusion , build skills and capacity.</p> <p>Introduction of ordinary available provision - a standardised approach for Worcestershire . Over 30 schools are taking part in the first roll out of this programme that is intended to improve identification and early support, reducing the need to assess for an EHCP</p> <p>Introduction of the Partnership in Inclusion of Neurodivergence Schools (NHS funded) programme. 30 schools taking part in yearlong co-produced programme to develop capacity, knowledge , skills and confidence to take a whole school approach to neurodiversity that includes all children.</p> <p>2025/26 programme has additional elements - APST/ testing assistive technology for children with SEND</p>	<p>AP outreach has assisted in reducing suspensions and permanent exclusions, improving practice that is sustainable to reducing demand for specialist provision</p> <p>Impact of PINs and OAP will be measured in next academic year. Early indications from level of take up from education sector demonstrates commitment to change</p>		Sarah Wilkins	2024- 2026

Creating an Inclusive and Sustainable System

- The Change Programme will continue to work in parallel with other DfE programmes to deliver the change that is required to improve outcomes for children within a financially sustainable system.
- By testing and refining key SEND and AP reforms, the Change Programme seeks to understand what it takes to deliver these as a complete system, across different local areas, highlighting any unintended consequences.
- We also recognise your wider context is one of considerable change for local authorities and key partners such as health.



A focused package of testing asks for the extension

The package of testing asks for the extension are designed to build out our understanding of how to operationalise the right support and capacity building to enable the shift towards inclusion in mainstream settings, including how these come together into an inclusion support off tailored to local needs.

Access to a broad & coherent offer of **universal & targeted inclusion support**

Local Inclusion Support Officer prototyping

- ✓ New ask
- ✓ Funded

AP 3-Tier Model

- New ask
- ✓ Funded

APST

- ✓ New ask
Updated with new funding available
- ✓ Funded

PINS

- ✓ New ask
Within scope of the CP
- ✓ Funded

Other

Testing of additional new asks may come into scope i.e. QA of non-school Unregistered AP

ELSEC

- New ask
- ✓ Funded

AT Lending Libraries

- ✓ New ask
- ✓ Funded

SEN Units / RPs

- ✓ New ask

Workstream 8: SEN Sufficiency and Provision Planning – Capital

Area of Focus	Activity	Impact- Outcome for Children	Impact- Cost Control	Owner	Timeline
Provision planning and capital programme for provision that meets needs from improving mainstream environments for SEN inclusion to SEN units attached to mainstream and the expansion of special schools.	Capital programme has been underway and agreed further for 25/26 - 28/29 (3 yrs) £28m committed to capital programme for SEND.	Development of provision- please see linked documents. https://www.worcestershire.gov.uk/sites/default/files/2025-03/SEND%20provision%20planning%20comms%20sheet%20FINAL.pdf Cabinet report 6th Feb 2025 - sufficiency and capital programme Education sufficiency, school organisation and provision planning Worcestershire County Council		Sarah Wilkins	2026-29
Worcestershire Special Free School	New Special school for Children with Autism to be built providing additional 120 places	Worcestershire Special Free School Worcestershire County Council	Annual savings £2.7m 7 New Autism Special Free School v2.0 for Cabinet 28.03.2024.pdf	Sarah Wilkins	School to be open September 2027



Early Years and Childcare Update

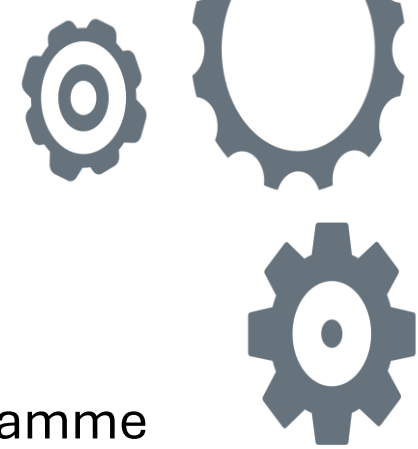


Early Entitlements Expansion

- 30 hours commenced from September 2025
- Official figures will be published shortly, but validation rates remain high:

	National	Worcestershire
Summer Term – Existing	95%	97%
Summer Term – New	88%	88%
Autumn Term – Existing	95%	97%
Autumn Term - New	77%	88%

- Take-up of Two-Year-Old Funding (FRAS) continued to decrease , with 57% take-up in the Summer Term, compared to 67% in 2024; as expected, system updates for Autumn Term have increased take-up to over 70% (to date)



School Based Early Years Capital

- Phase 2 of the School-based Early Years Capital programme commenced on Monday 22nd September.
- Primary-phased schools, as well as maintained nursery schools, can apply for up to £150,000 to create additional early years provision.
- Schools must have LA support: Expression of Interest process in place for schools to request an LA assessment.
- DfE assessment process focuses on deprivation.
- No longer a requirement to have surplus accommodation.

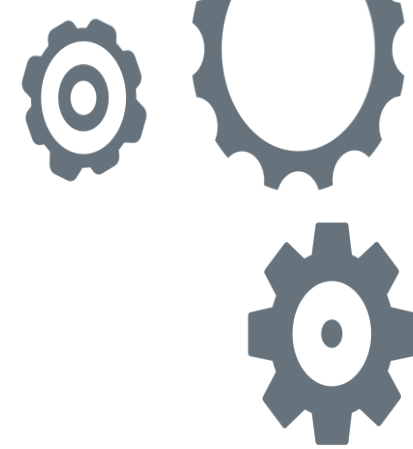


Wraparound Programme

- Programme aim continues to be ensuring 8am-6pm provision is available for primary phase pupils however additional flexibilities have been added.
- Programme officially continues until March 2026, however expectation that LA's continue to use the programme funding to increase availability of wraparound provision.

Fully compliant	Wraparound provision in place but not fully compliant	Some provision in place (either b/s or a/s)	No provision in place
172	14	7	3

- We've funded almost 750 new/expanded places



Early Adopters Breakfast Clubs

- 13 Worcestershire schools involved
- DfE host regular Peer to Peer support sessions
- Feedback is mostly positive, highlighting benefits to families and children, however ongoing concerns regarding:
 - Funding doesn't support sustainable and/or high-quality provision or enable appropriate support for children with SEND
 - Alignment with Nursery agenda
- National rollout will start from April 2026:
 - 2000 new schools to join existing 750 schools
- Roll of the LA is yet to be announced

Report to the Worcestershire Schools Forum (WSF) **Sector Response to the Statutory Guidance Changes**

1. Purpose

- 1.1 To update the Worcestershire Schools Forum on the Early Years Sector Response to the Statutory Guidance Changes.

2. Position

Over 330 provider representatives attended the NEF Briefing in March, following the publication of the refreshed NEF guidance. As a response to the questions raised, we published FAQ's and offered individual support meetings. To date, we have met with almost 90 settings individually to discuss the options and their plans. Support continues to be available over the Summer Term.

Of note within the statutory guidance:

- Parents must be able to opt out of paying for chargeable extras and the associated consumable or activity for their child.
- Providers should deliver the free entitlements consistently, so that all children within a setting accessing any of the free entitlements receive the same quality and access to provision, regardless of whether they choose to pay for voluntary hours, voluntary extra services, meals or consumables.
- Local authorities should ensure that providers work with parents so that parents understand which hours and sessions can be taken as free provision.

Childminders

Most childminders in Worcestershire charge less than the funding rate for 0-3 year olds and are, in the main, not charging significantly more than the 3&4 year old rate. They are therefore generally able to recover the shortfall in funding through a small charge for food/consumables/additional services.

However, due to the differentiated funding rates for each age-group, childminders will often experience a year-on-year decrease in income as children age through their provision; they would prefer an averaged funding rate that applies for all age-groups, however the DSG restrictions prohibit this.

Group-based provision (pre-schools/day nurseries/independent schools)

Pre-Schools

We've met with 14/48 pre-schools (29%) and in the main, they can rearrange their current pricing structures to include a charge for the additional services they offer. Due to their staffing arrangements, they are generally unable to restrict access to their additional services; they are therefore reliant on parents voluntarily paying the charge. The risk for these settings is that if parents do not choose to pay the voluntary contribution, they are likely to be unsustainable going forward.

Day Nurseries and Independent School Nurseries

We've met with 55/129 (43%) day nurseries plus 5/10 (50%) of the Independent Schools and in the main, they are choosing one of two pricing structure:

1. Offering funding over the whole day and charging for each additional service offered; this will include a daily charge for all meals/snacks with an option for parents to provide their own, a daily charge for consumables to include cooking ingredients/garden resources etc with an option for parents to provide their own and a charge for each optional additional activity offered, such as forest school, language sessions, dance, yoga etc, with the child not accessing the activity if parents choose not to pay for it.

Whilst this enables working parents to access the funded hours in a way that suits their working patterns, they will have to pay for anything extra, which will result in some children missing out on opportunities due to parental choice/circumstances. The sustainability of the setting is reliant on parents choosing to pay for the additional services.

2. Offering set hours for the funding, typically in the afternoons (1-6), although some settings are offering a longer option (i.e., 9-3), with all other hours offered as private, non-funded hours. There will normally then be a charge for tea and snacks, with an option for parents to provide their own.

This option is much less flexible and will mean that families cannot access their child's funding in a way that supports their working pattern, particularly if they work part-time. However, it also means that all children attending have access to the same additional services and is very clear for parents to understand. It may result in some parents changing their working patterns to suit the funded offer.

School-based provision (academy/maintained/free/governor led)

On the whole, our school-based provision tends to operate either completely for free or with only a nominal voluntary charge for snacks/additional services, e.g., Forest school. Schools are generally not too concerned about the changes and are managing to make any required changes without support.

'Speciality' Settings

The more specialised settings, such as those offering solely Forest School provision or primarily supporting children with complex SEND, are still struggling to find a way of operating that ensures their business costs are covered and enables a free option for children to attend. There is a risk that these settings will be unable to sustain themselves long-term.

Speciality settings, along with pre-schools, are the most at risk of becoming unsustainable, leading to closure.

National Monitoring

The DfE are monitoring the impact of the statutory guidance changes via the take-up of funded provision and parental feedback. Alongside the rollout of the Childcare Expansion in September 2025, they are continuing to assess the sufficiency of provision in each Local Authority, through both data interrogation and termly LA 'readiness' surveys.

3. Recommendations

- 4.1 The WSF notes and discuss.

Nicky Burford
Early Years and Childcare Sufficiency and Improvement Lead
Worcestershire County Council
October 2025

Report to the Worcestershire Schools Forum (WSF)

Early Years Inclusion Funding

1. Purpose

1.1 To outline alternative model for funding the Early Years sector in relation to SEND needs. (provision of Ordinarily Available Inclusive Provision). This relates only to the Early Years Inclusion Funding Supplement and will not cover other areas of spend regarding SEND that is directly commissioned for specialist provision. This proposal of change is with the intention of creating more control of high needs spend and will be included as part of the High Needs Management Plan. The current arrangements and process for funding need is over complicated in terms of process and components of cost for each level of funding. The changes simplify the process and control spend to those most in need.

2. Background

2.1 In March 2024 an exercise was undertaken regarding early years setting capacity building, sufficiency planning and supporting working parents. This outlined several proposals, one of which was to review the hourly rates as given for the Early Years Inclusion Funding Supplement. Through the Early Years Stakeholder meetings, the issue of funding in the Early Years sector was raised and discussed by settings.

2.2 In December 2024 a further summary was produced with the suggested rates and criteria, and since that time financial modelling has been carried out to show potential impact of keeping the current system and moving to the proposed new funding rates. This was shared at the WCC Childcare Management Meeting on 16th May 2025. This meeting provides WCC strategic oversight of the childcare expansion programme and commissioning of the sector.

3. Current Position

3.1 This indicative and historic budget is overspent and is on an upwards trend. There is an increase in the number of children not receiving their full NEF entitlement due to settings challenge in meeting needs. Early Years Providers have autonomy over a £1m spend and there is concern over the active monitoring of this in terms of outcomes for children. The Local Authority needs a greater confidence in the control of the budget and allocation of funds.

3.2 Some providers are not claiming the correct level of funding and although they are supporting complex children, they are reducing the hours offered to the child. This results in children not being able to access their full NEF entitlement.

3.3 This proposal therefore is not about reducing spend, but to control spend and more critically, getting the funding to the right children at the right level at the right time to meet their needs.

3.4 We are aware of further significant policy changes that should support the sector and better meet needs. These include the Best Start for Life Strategy and the setting of GLD targets for children, along with the expected SEND White Paper that is indicating the recognition and support for early years SEND support. Simplifying and controlling this current process of funding can be consulted upon and implemented as not detrimental to meeting children's needs under new policy.

3.5 Table 1 below shows the increase in spend that has occurred over time; it must also be recognised that the change in entitlement to 2-year-olds will also have impacted on number of children attending an Early Years Provider, and therefore impact on identification of need at an earlier point.

Table 1 – Spend over time

Year	Total Spend	Sample Breakdown of spend
2020/2021	£1,214,090	£1,156,605.40 GR Levels / Exceptional £328,227.26 / £57,000 2-yr-old funding
2021/2022	£1,671,211	£1,453,465.89 GR Levels / Exceptional £302,470.21 / £88,306 2-year-old funding
2022/2023	£1,951,653	£2,102,059.05 GR Levels / Exceptional £ / £94,525.97 2-year-old funding
2024/2025 (last financial year)	£3,269,190	£1,857,127.51 GR Levels / Exceptional £1,003,777.22 / £477,266.86 Under 2's & 2-3-year-old funding.

Table 2 – anticipated costs with identified budget of £2,163,580

Year 2025-2026	Expected Total Spend	Model used
Expected rise owing to childcare entitlement expansion impact	£3,319,190	Based on current funding model
	£2,762,480	We predict the new model may spend, to include a 'Universal' payment for the Graduated Response Includes 50% of GR4's to Level 1
	£2,962,480	New model with risk factor of 50% of GR3's to Level 2 in addition to above GR4's to Level 1

4. Options

4.1 The tables of information above show that by continuing with the same funding model, we are likely to continue to spend over £1,155,610 beyond the indicative allocation. With the new model we can have greater control and reduce this overspend by between £798, 900 and £598,900.

4.2 The risks and analysis

Risk	Mitigation
From analysing live examples, we can see some providers will be worse off using the new model.	Support and intervention from Area SENDCo's will mitigate for this.
If setting's do not receive funding previously expected they may state that children's needs cannot be met – this may mean children do not have access to provision	Support and intervention from Area SENDCo's will mitigate for this.

From analysing individual cases, we believe, in some cases, providers have been claiming less than they should have been. Providers claiming GR4 rather than Challenge / Exceptional. So, our future predictions on a new model cost may not be accurate.	We have included a risk factor of 50% increase of GR3's & GR4's to Level 1's, based on samples taken, which allow demonstrate an increase to our predicted budget, would still be under our predicted current spend.
Predictions are assumed	This data is only a picture of one time, however, the themes the data is telling us remains the same. If we wait for new data, the themes will likely continue.
If we do nothing, we will be at least £1.2million over allocated amount, likely more including trend data for rising SEN.	The proposed funding changes allows a more accurate distribution of funds, based on need.
In the current model, providers tell us what they want to claim, control over moderation and decision making is a weakness	The new model allows us to change the system to facilitate the LA to be in control of the distribution & allocation for future funding.

4.3 Managing risks - The monitoring aspect is critical to the success of any new model, and to enable this to be effectively carried out we already have agreement for a Business Support Officer to support managing and monitoring this budget. To further ensure the LA are taking responsibility for this budget, there would be a panel established of LA officers (could include sector representation for moderation) to review applications made by providers and funding given based on needs and required provision.

4.4 Proposal - Implementation of new rates from April 2026, with processes around allocation of funds in place also starting at this time. The governance process for this will be WCC High Needs Management Group for approval, Worcestershire Schools Forum for agreement to consult with EY sector and outcome of consultation and the Cabinet Member decision to implement.

Appendix A gives overview of current rates and proposed new rates.

5. Recommendation

5.1 Worcestershire Schools Forum are asked to note the report and support further consultation with the sector

Timeline and process for implementation and governance

Spring 2025	Consultation and co-design
June 2025	Childcare Expansion Management Group
August 2025	High Needs management – DLT Meeting
October 2025	Worcestershire Schools Forum
October/November 2025 (6 weeks)	Consultation with Sector
December 2025	Worcestershire Schools Forum
Spring 2026	CMR Decision
April 2026	Implementation

Sarah Wilkins
Assistant Director for Education, Early Years, Inclusion and Place Planning
Worcestershire County Council
October 2025

Appendix A – Hourly rates for current and new system for the Early Years Inclusion Funding Supplement

Current levels and rates of pay per hour

These funding levels are received by the providers, in addition to the NEF hourly rates.

GR Level	Age-Group	Hourly Supplement
GR2	3&4 Year Olds only	£0.90
GR3	All funded children	£1.60
GR4	All funded children	£2.86
Exceptional	All funded children, approval required	£6.30

All children either in receipt of a final EHCP or underassessment prior to statutory school age, receive Exceptional Inclusion Supplement at £6.30 per hour.

The proposed New rates

New level <i>Italics show mapping to current model</i>	Hourly rate of Inclusion Supplement 3 and 4 years	Hourly rate of Inclusion Supplement 2-year-olds
Emerging Needs / Low level needs – required by Statutory Guidance	£0.50	£0.50
Level 1 <i>Fairer replacement of Gr 4+ Challenge</i>	£4.35	£2.31
Level 2 <i>Equivalent to exceptional needs funding in current model</i>	£8.70	£6.66
Level 3 <i>Funding here is higher for low incidence high-cost needs, linked more to physical needs and sensory disabilities</i>	£9.70	£7.66
Level 4 <i>Most significant level of needs which span all areas of development, e.g. HI/VI/MSI</i>	£17.40	£13.32

Timeline and process for implementation and governance

HN management – August

Schools Forum – September for consultation

Consultation with the sector – 6 weeks

Schools Forum outcome – December

CMR decision – Phil Rook/SF

Implementation – April

Get details from Nicky Burford on consultation and co-design Spring

Childcare Management Group June

HNM DLT Meeting

Schools Forum 9th October

Consultation with the sector

Sarah Wilkins
Assistant Director Education, Early Years, Inclusion and Pupil Place Planning
Worcestershire County Council
October 2025

Report to the Worcestershire Schools Forum (WSF)

WSF Decisions Needed

1. Purpose

- 1.1 To seek agreement from members of WSF to transfer 0.5% of the school block to the High Needs block.
- 1.2 Any adjustment is shared equally by all schools by reducing the Age Weighted Pupil Unit (AWPU).
- 1.3 To support the requirement of the High Needs Block to support the children of Worcestershire, who have Special Educational Needs and Disabilities (SEND)
- 1.4 We are seeking this agreement in anticipation of the funding regulations for schools remaining the same as in prior years.

2. Background

- 2.1 As agreed for the financial year 2025/26, the Council are seeking agreement from WSF to transfer 0.5% of the school block to the high needs block.
- 2.3 We are in a position now that we cannot give you the funding rates for the council. This has been delayed by the Department for Education due to the funding review in June 2025.
- 2.4 0.5% of the 2025-26 financial year funding was £2,283,957. This was funded by reducing the AWPU by £45, using the minimum amount for the minimum funding guarantee (MFG) and capping at 0.55% on a 100% scaling and reducing the growth fund by 12.32%. This equated to £30.93 per pupil received within the school block area.
- 2.5 The full amount would be transferred to the high needs block, which all goes to support children and young people and would not just be a way of offsetting the increasing deficit. The council cannot confirm how this would be used within the high needs block, whose current funding is not keeping up with demand.

3. Current Position

- 3.1 We are seeking agreement from WSF to transfer 0.5% of the school block to the high needs block.
- 3.2 The actual amount or true estimate will not be known until the funding rates for schools are known. The DfE are saying this will be released in the autumn term, and no later than December.
- 3.3 The council acknowledges that this will increase the pressure on mainstream schools, with the reduction of an amount per pupil, with the suggestion to use the same model as much as possible as last year, with the biggest part being against AWPU, so that all schools would take a similar change in funding, due to their size.
- 3.4 The benefit of using the AWPU is that schools with diverse pupil needs would still receive the funding to support these pupils, with some of these factors also being a major indicator of additional educational needs.

4. Recommendation

- 4.1 The WSF are requesting: -
 - Agree that the Council can transfer from the school block to the high needs block 0.5% of the overall allocation.

- That this will be a reduction in the AWP rate so that all schools equally share any financial implications without reducing funding rates on other pupil-specific factors.
- That the local authority also uses, where possible, reducing the Minimum Funding Guarantee and Capping to aid this process.

Robert Phillips
Finance Business Partner
Worcestershire County Council
December 2024

Report to the Worcestershire Schools Forum (WSF) De-delegated Services

1. Purpose

- 1.1 The reason is to bring to your attention and decide on the de-delegated services from mainstream maintained schools.

2. Background

- 2.1 The de-delegated service is agreed annually by WSF on behalf of all maintained mainstream schools. This has been in effect since 2013 with the new funding formula.
- 2.2 The services that are de-delegated are as follows:
- Contingency Fund
 - Free School Meal Eligibility Checking
 - Staff Cost Supply Cover
 - Support for underperforming Ethnic Minority Groups and Bilingual Learning
- 2.3 The services that could be requested but are not requested are as follows:
- Insurance (Funded directly by Schools)
 - Licences/Subscriptions (Funded directly by Schools)
 - Behaviour Support Services (Funded directly by Schools)
 - Museum and Library Services (Funded directly by Schools)
 - Additional School Improvement Service (Funded directly by Worcestershire County Council)
 - Education Functions for Maintained Mainstream Schools (Funded directly by Worcestershire County Council)
- 2.4 If a school converts to an academy from 2 April to 31 August, they will receive 7/12 back into the maintained school budget of the de-delegated charge back. If a school converts after this date, they are charged for the full year. The academy can opt to purchase some of these services from either the Worcestershire County Council. The method of funding may be different, but it supplies the same services.
- 2.5 The current rates have remained the same since 2013, whilst costs have increased dramatically over this period.
- 2.6 This is a way for schools to share the cost of these services.

3. Current Position

- 3.1 This financial year, we have de-delegated the following amount from schools, and the use of this money is also listed within Table 1.

Service Fund	Amount (£)	Use of Income/Service
Contingency Fund	88,091	To support schools in financial difficulty, redundancy costs, unforeseen expenses, suspension costs, for example.
Free School Meal Eligibility Checking	14,275	To pay for the FSM eligibility checking for all maintained mainstream schools. With the Worcestershire County Council contributing to this service. Academies can also purchase this service.
Staff Cost Supply Cover	80,288	This is used to cover the cost of trade union duties for staff to attend meetings to support the school's staff. Support with other supply cover for specific reasons. Academies can buy into this service.
Support for underperforming Ethnic Minority Groups and Bilingual Learning	178,377	This funding is used to support the running costs of the English as an Additional Language team and the Gypsy Roma Traveller Team. With the Worcestershire County Council contributing to both teams.

Table 1 Breakdown of De-delegated Services

- 3.2 The current amount is reducing each year due to conversions of schools and changes in the number of pupils in our schools. This means that the services are struggling to meet the needs of schools at their current levels. The local authority would like to increase this in line with the current teacher pay award by 4% in the academic year 2025/26. Table 2 below shows the suggested rates per factor.

Service Funded	Factor	Current Rate	Proposed Rate
Contingency Fund	AWPU	£4.29	£4.46
Free School Meal Eligibility Checking	FSM	£3.94	£4.10
Staff Cost Supply Cover	AWPU	£3.91	£4.07
Support to underperforming Ethnic Minority Groups and Bilingual Learning	Low Prior Attainment & EAL 3	£18.31 £79.13	£19.04 £82.30

Table 2 Current and proposed rates for De-delegation

4. Recommendation

- 4.1 The request is for WSF to note for information and discussion.
- 4.2 Agree if they wish a consultation with a mainstream maintained school to take place on this factor.

- 4.3 Agree if no to part 4.2 if they will allow for these services to be again de-delegated in the financial year 2026/27
- 4.4 Agree on an increase to the de-delegated rates of 4% for the financial year 2026/27

Robert Phillips
Finance Business Partner - Schools
Worcestershire County Council
October 2025

Report to the Worcestershire Schools Forum (WSF)

Funding Mechanism for School Block Funding

1. Purpose

- 1.1 To seek agreement on the funding mechanism for the school block funding for schools.

2. Background

- 2.1 In previous years, a decision from WSF was not to consult with schools on the school block funding mechanism for the financial year.
- 2.2 With the agreement for the next financial year 2026/27, we need agreement on whether you wish us to consult with schools on the funding mechanism or if you are happy to be that body.
- 2.3 We would normally have the proposed funding rates from the Department for Education (DfE) for the National Funding Formula (NFF). This year, we have not received this yet and have not received an announcement on the funding rates to the Local Authority (LA) for the “Dedicated Schools Grant” (DSG).
- 2.4 This announcement we are hoping will come shortly, and we have raised the issues this is causing with the Department for Education (DfE).
- 2.5 The DfE have no plans to extend the timescales for LAs to return the Authority Proforma Tool (APT) to them in January 2026.
- 2.6 Due to the lack of this information, it's not aiding us or schools with any funding assumptions for next year or future years.
- 2.7 The delay, we have been informed, is due to the three-year funding settlement, which was released earlier this year. They need time to calculate how this will work going forward.

3. Current Position

- 3.1 We do not have any actual known funding rates to use, nor timescales for the announcement of these rates, just in the autumn term.
- 3.2 We know that we will need to take to the Council in December the proposed funding mechanism for mainstream schools within Worcestershire, and this will need to be in the public domain in November.
- 3.3 This is not leaving us time to agree on matters as we would normally have liked, giving you time to know this information in advance.

4. Recommendation

- 4.1 We are requesting the following from WSF:
- 4.1.1 That we keep with the current funding model that we use with our schools. Trying to match the NFF as closely as possible, this may need to change depending on the outcome of Agenda Item
- 12a (Transfer from School Block to HLN 2026/27),
 - 12b (De-delegation for Mainstream schools and Central Block 2026/27),
 - 12d (Disapplication Exceptional Premises 2026/27), and
 - 12e (Falling Rolls Funding 2026/27).
- 4.1.2 That we can take your agreement forward to produce and publish the information necessary for our December Council Meeting.

- 4.1.3 Once available, we will share with WSF the funding rates and, if necessary, any decisions made over email, which were required before the next planned meeting on 27 November 2025.

Robert Phillips
Finance Business Partner – Schools.
Worcestershire Children First
October 2025

Report to the Worcestershire Schools Forum (WSF) Disapplication Request – Exceptional Premises

1. Purpose

- 1.1 The Local Authority (LA) needs to submit a disapplication request to the Department for Education (DfE) for the disapplication for consideration and approval by the Secretary of State for Education.
- 1.2 To seek agreement, we should also have agreement from WSF that the LA can seek this approval from the DfE and the Secretary of State for Education.
- 1.3 This would also allow for the LA to include this within our request for the Council to approve this as part of the Worcestershire Local Funding Formula (LFF) for the financial year 2026/27.

2. Background

- 2.1 The current funding formula has an exceptional factor for premises.
- 2.2 The cost for this financial year 2025/26 is £26,121 compared to £103,599 in 2023/24. The current split is over 3 primary schools. With what would have been the fourth school agreeing with the DfE that they were a split site, so are only entitled to one of the funding streams, so needed to be removed from this disapplication.
- 2.3 This factor supports schools who do not have facilities, for example a hall or sports hall so that they can meet the educational needs of their pupils. These schools are:
 - Overbury CofE First School - £10,326
 - Tardebigge CofE First School - £7,795
 - Suckley Primary School - £8,000
- 2.4 The schools also need to prove each year that they are spending at least this amount on these facilities, which we also need to share with the DfE.
- 2.5 The criteria for disapplication prescribed by the Department for Education are that it must be more than 1% of the School Block Funding and apply to fewer than 5% of the schools with the LA.
- 2.6 The disapplication allows us to apply it for those schools if they still meet the requirement of being more than 1% of Schools Block Funding.
- 2.7 The DfE have made it clear that they would like to end this process as it is not part of an overall National Funding Formula (NFF).

3. Current Position

- 3.1 £26,121 is allocated through this funding factor to 3 primary schools. If agreed, the Designated Schools Grant is increased the following year by this amount; this is lag funded.
- 3.2 WSF agreed on this factor since 2012 for the financial year 2013/14, the number of schools has reduced. The LA must apply annually for this funding factor as the DfE is working towards a national funding formula. They are looking at this factor closely as it does not fit with a totally formula-driven funding formula.
- 3.3 Worcestershire Children First has undertaken modelling in this area of expenditure and contacted schools that will be affected by this funding.
- 3.4 We are awaiting the information from the schools as supporting information for the funding to share with the ESFA within our disapplication.

4. Recommendation

- 4.1 We are seeking the agreement of WSF that we can submit a disapplication for this again this year.

Robert Phillips
Finance Business Partner – Schools.
Worcestershire Children First
October 2025

Report to the Worcestershire Schools Forum (WSF) Falling Rolls Funding 2026/27

1. Purpose

- 1.1 We are requesting your agreement to further investigate and set criteria for this funding, which will allow for the support of mainstream schools only. This will not consider whether they are a maintained or academy school, as both will be equally considered and will be paid as a lump sum, with no consideration for lagged funding.

2. Reason for Request

- 2.1 This has been a funding stream we have been able to consider, but it has not been such an issue for most schools overall. original guidance also meant it would not be a fair overall and required the school to be good or outstanding.
- 2.2 We are finding that more schools are starting to fall into this with the reduction in birth rate, with Worcester also now needing places within a couple of years due to local building and wanting to support the schools whilst this is needed to save them, reducing the Pupil Admissions Number and then needing to increase it again.
- 2.3 We are still trying to understand the model that would best fit for Worcestershire.
- 2.4 We do not want this fund to risk the School Block Designated Schools Grant (DSG), so we are looking at using part of the Growth fund to take the money from for this funding stream.
- 2.5 Other local authorities using this model require schools to apply for this funding, and it needs to be supported by evidence from them and the local authority. The criteria would need to be robust so that it is used where it is necessary to benefit Worcestershire as a whole, and evidence-based.

4. Recommendation

- 4.1 We are seeking your agreement to continue with the development of this model and present this at the next meeting or, if necessary, by email to allow us to include it within the Worcestershire Local Funding Model.
- 4.2 We are seeking agreement that this would be funded from the Growth Fund received as part of the School Block, within our DSG.
- 4.3 You agree that specific criteria and a maximum amount allocated from the Growth Fund, and that if necessary, the amount per vacant place will be adjusted to not overspend this amount.

Robert Phillips
Finance Business Partner
Worcestershire County Council
October 2025

Report to the Worcestershire Schools Forum (WSF) Amalgamation of Abbey Park First and Nursery & Abbey Park Middle 2025/26

1. Purpose

- 1.1 To confirm the position of Abbey Park First and Nursery School and Abbey Park Middle School.
- 1.2 How we have made this decision.
- 1.3 The financial impact of these decisions.

2. Background

- 2.1 Relevant background information

The Pershore Education Planning Area (EPA) was historically a three-tier education system, with first schools (Reception to Year 4), middle schools (Years 5 to 7) and a high school (Years 8 to 13).

Changes to schools over several years led to uncertainty and concerns about the sustainability of some schools across the education planning area. In September 2019, the first three schools in the Pershore area were approved by the Regional Schools Commissioner to change to primary schools, along with Pershore High School, adding an intake in Year 7 to create an option of a two-tier system of education for families.

The creation of additional places in years 5, 6 and 7 because of the approved changes resulted in an ongoing level of surplus in these year groups (40% in September 2024 and projected to rise) and created significant difficulty for schools in delivering the Key Stage 3 (Year 7, ages 10 to 11) curriculum. The mix of two-tier and three-tier schools created a risk to ensuring clear and quality education journeys for pupils.

From 2020 to 2021, WCC facilitated engagement with education stakeholders, including all schools in the pyramid, Multi-Academy Trusts, the Department for Education's Regions Group and the Dioceses, to find agreed solutions to manage this risk within the education planning area.

In July 2021, all of the schools' governing bodies and Multi-Academy Trusts confirmed their agreement/intentions to consult on the proposed change to a two-tier Education Planning area, to seek changes of age range (where necessary) and, for the Middle Schools, to amalgamate with the First Schools.

A consultation was held during October and November 2021, which received a total of 270 responses with 78% agreeing and 16% disagreeing on the proposal to convert to a single two-tier system. A further 6% neither agreed nor disagreed.

In April 2022, the Council's Cabinet agreed a commitment to support a collective change of age range to align schools in the Pershore education planning area to a single two-tier (primary and secondary) system of education, subject to confirmation of the necessary Department for Education funding for the expansion of Pershore High School Year 7 places.

Confirmation of that funding, and of the timetable for the creation of the additional Year 7 places, was received in 2023. It was determined that a new consultation exercise should be undertaken to ensure that all current stakeholders were given the opportunity to consult and comment on the proposals.

A co-ordinated consultation was held during September 2024, whereby each of the schools proposing a change as part of the area review sought feedback from all parties who may be affected by those changes. Abbey Park Federation held consultation events on 12th September and 13th September.

The proposal relating to Abbey Park First School and Abbey Park Middle School was for the Middle School to close, amalgamating Years 5 & 6 into Abbey Park Primary School, and to alter the age range from 3-12 to 2-11. It was also proposed to change the age range of the Mainstream Autism Base (SEN Resourced Provision) from 9 to 12 to 4 to 11 and increase the number of full-time equivalent places available from 10 to 18.

The Department for Education's guidance on [making significant changes to maintained schools](#) sets out the processes to be followed for specified changes at community and voluntary schools. As Abbey Park First and Middle Schools were community schools and the changes proposed exceeded the threshold for a proposed change of age range, the specified decision maker for the proposal was the Local Authority, which for WCC was the Cabinet Member with Responsibility for Education.

On 24/12/2025, the Cabinet Member with Responsibility for Education approved:

- the change of age range of Abbey Park First School from 3-9 to 2-11, and
- the amalgamation with Abbey Park Middle School, and
- the alteration of the SEN provision

3. Current Position

3.1 Current position

From 1st September 2025, the schools will officially amalgamate to become a primary school, Abbey Park Primary School, with an age range of 2-11. The school will, however, retain Year 7 pupils in the interim 2-year period until the Pershore High School expansion is completed. For clarity, there will be no Year 5 intake from external applicants from September 2025 onwards.

Pupils who enter Year 7 in September 2025 and September 2026 will remain at Abbey Park Primary School, and from September 2027, all Year 7 pupils will be admitted to Pershore High School, and Abbey Park Primary School will operate up to Year 6 only, in line with the standard primary age range.

The Published Admission Number for the primary school will remain at 30.

The Mainstream Autism Base (SEN Provision) age range will be 5 – 11 years (Year 1 – Year 6), and the number of pupils increased from 10 to 18.

For the remainder of the financial year 2025/26, the two schools' budget will be amalgamated, so no change in funding for this financial year.

For the financial year 2026/27, the schools will receive 1.75 times the full lump sum amount with all the normal pupil level funding. With the .25 of a lump-sum not being included in any Minimum funding amount, as it needs to be excluded from the full protection.

For the financial year 2027/28, all protection through the lump sum is removed, and the school receives funding like any other mainstream school within Worcestershire.

4. Recommendation

4.1 For WSF to note and discuss the above position.

Robert Phillips
Finance Business Partner - Schools
Worcestershire County Council
October 2025

REPORT TO THE WORCESTERSHIRE SCHOOLS FORUM (WSF)
MAINTAINED SCHOOL BALANCES 2024/25

1.0 PURPOSE

- 1.1 To inform the WSF of the revenue balances held by maintained schools for the financial year 2024/25.

2.0 BACKGROUND INFORMATION

- 2.1 Individual school budgets are funded from the Dedicated Schools Grant (DSG), grants from the Government and other income streams.
- 2.2 The WSF are reminded that the LA has a provision in its Scheme for Financing Schools to challenge excess surplus balances held by schools over the permitted level for their sector. However, in view of the current financial pressures on schools, permission is requested for the challenge process to again be light-touch this year.

3.0 SUMMARY BALANCES

- 3.1 Overall school balances have reduced this year by **£2,292,283** from **£9,371,403** to **£6,443,120**. **£2,598,749** of this relates to schools that converted to an academy, included in 2023/24 and balances paid over during 2024/25. The true adjustment removing academies' balances would have been an increase of **£306,466**. An analysis of year-end balances by school and sector is attached in **Appendix A**.
- 3.2 Summary of year-end balance by sector is shown in the table below. * Denotes the balances as a percentage of total in-year resources.

	2023/24 £	*2023/24 %	2024/25 £	*2024/25 %	Variance £
Nursery & Primary	6,772,665	5.22%	4,948,860	4.09%	(1,823,795)
Secondary	(1,597,371)	(4.43%)	(2,286,117)	(6.35%)	(688,746)
Special	3,800,616	16.40%	3,395,587	13.46%	(405,029)
PRUs	395,503	12.33%	384,790	10.95%	(10,713)
Total	9,371,403	4.87%	6,443,120	3.47%	(2,928,283)

- 3.3 The average balance by phase, adjusted for academy conversions as detailed in **Appendix A**, is shown in the table below:

	2023/24 £	2024/25 £	Variance £
Nursery & Primary	71,291	58,222	(13,069)
Secondary	(199,671)	(326,588)	(126,917)
Special	950,154	848,897	(101,257)
PRUs	131,834	128,263	(3,571)

4.0 SCHOOLS IN DEFICIT

- 4.1 The number of schools ending the financial year 2024/25 in deficit has decreased by one. In total, there are 30 schools, compared to 29 at the end of the 2023/24 academic year. This is detailed in the table below:-

	2023/24	2024/25	Variance
Nursery & Primary	25	25	-
Secondary	3	4	1
Special	0	0	-
PRUs	1	1	-
Total	29	30	1

- 4.2 The total value of deficit balances for 2024/25 is £7,401,512 compared to £6,546,698 for 2023/24. This is an increase of £854,814 and is detailed in the table below. The largest deficit balance for 2024/25 is £3,040,842. This is an increase of £131,400 from £2,909,442 at the end of 2023/24

	2023/24 £	2024/25 £	Variance £
Nursery & Primary	(3,152,624)	(3,863,812)	101,066
Secondary	(3,316,661)	(3,483,223)	4,148,511
Special	-	-	-
PRUs	(77,413)	(54,478)	(22,834)
Total	(6,546,698)	(7,401,512)	4,226,680

5.0 BUDGET SETTING 2024/25

- 5.1 For the maintained schools' setting budgets for 2025/26, 44 have set a deficit budget. 24 schools ending 2023/24 in deficit balance have set a deficit budget for 2024/25. The total value budgeted by schools as their final budget position is a deficit of £5,786,893. This equates to an £12,230,013 adjustment over this financial year.
- 5.2 The following points should be noted:
- The Local Government Pension Fund (LGPS) is fully funded for the period, 2023-2024 to 2025-2026, therefore there will be no pensions back funding charge to maintained schools. This is an annual saving of £2.9m based on last year's charge.
 - All schools this year have been required to submit a three-year budget to the local authority.
- 5.3 All school settings with a deficit budget or ending the financial year with a deficit require a licence to operate with a delegated budget, which is approved by the County Council's Chief Financial Officer.

To determine the conditions of the licence, there will be a requirement to provide a detailed medium-term financial plan detailing plans to return to a balanced budget. In

addition, Schools may be subject to review by a DfE Schools Resource Management Advisor (SRMA).

5.4 The following conditions still exist to enable the Schools Finance Team to support schools operating with a deficit budget:

- No new appointments or changes to existing contracts being made without the Schools Finance Team approval,
- The school must work with the Schools Finance Team and School Improvement Advisors to return to an in-year surplus within 18 months and a balanced position within two years, or by exceptional agreement, five years. The expectation is that all savings made in the year contribute to reducing the deficit,
- All virements must be authorised by the Schools Finance Team, after approval has been sought in line with the school's Finance Policy.
- The school provides the Schools Finance Team with minutes evidencing discussion with Governors regarding recovery plans and progress against the budget,
- That a monthly budget monitoring report, which includes the annual budget outturn, is submitted to the Schools Finance Team.

As part of deficit recovery monitoring, there may be a requirement for schools to attend a 'Team Around the School Project (TASP)' meeting to review progress.

6.0 RECOMMENDATION

6.1 The WSF notes and discusses the above position.

Robert Phillips. Finance Business Partner - Schools
Worcestershire County Council
October 2025

SCHOOL BUDGET & CARRY FORWARD SUMMARY

Worcestershire County Council

Carry Forward **Carry Forward Range**

	Primary		Secondary		Special		PRU's		Total	
	2023/24	2024/25	2023/24	2024/25	2023/24	2024/25	2023/24	2024/25	2023/24	2024/25
<£0	25	25	3	4	-	-	1	1	29	30
£0<-£25,000	6	3	-	-	-	-	-	-	6	3
£25,001-£50,000	9	14	-	-	-	-	-	-	9	14
£50,001-£100,000	20	17	-	-	-	-	-	-	20	17
£100,001-£200,000	22	13	2	-	-	-	1	-	25	13
£200,001-300,000	5	5	1	2	-	-	1	2	7	9
>£300,000	8	8	2	1	4	4	-	-	14	13
Total	95	85	8	7	4	4	3	3	110	99

Average Balance	71,291	58,222	(199,671)	(326,588)	950,154	848,897	131,834	128,263		
Lowest Balance	(859,003)	(943,090)	(2,909,442)	(3,040,842)	731,654	585,377	(77,413)	(54,478)		
Highest Balance	941,818	840,397	831,185	683,437	1,271,005	1,076,852	288,103	236,970		
Total Value of deficits	(3,152,624)	(3,863,812)	(3,316,661)	(3,483,223)	-	-	(77,413)	(54,478)	(6,546,698)	(7,401,512)
Total Value of Surpluses	9,925,278	8,812,672	1,719,291	1,197,106	3,800,616	3,395,587	472,916	439,268	15,918,101	13,844,632
Total Value	6,772,655	4,948,860	(1,597,371)	(2,286,117)	3,800,616	3,395,587	395,503	384,790	9,371,403	6,443,120
Schools in Deficit in Current & Previous Year	20	19	3	3	-	-	1	1	24	23
Academy (Conversions)	1	8	1	-	0	-	0	-	2	8

Appendix A Schools' Carry-forward analysis 2022/23 & 2023/24									
Cost Centre	School	Total Resources 2023/24*	2023/24 CFWD inc interest		Total Resources	2024/25 CFWD inc interest		Movement	
			£	%		£	%	£	£
	NURSERY & PRIMARY SCHOOLS							Reductions	Increases
1001	EVESHAM NURSERY SCHOOL	617,973	(181,972)	(29.45)	643,134	(253,978)	(39.49)	(72,006)	
3000	ABBERLEY PAROCHIAL PRIMARY	748,947	52,281	6.98	766,938	79,589	10.38		27,308
2002	ALVECHURCH, CROWN MEADOW FIRST	2,280,294	14,150	0.62	2,455,297	(37,915)	(1.54)	(52,065)	
2006	ASHTON-UNDER-HILL FIRST	710,057	150,921	21.25	711,431	85,194	11.97	(65,728)	
3300	ASTLEY C.E. PRIMARY	713,167	81,677	11.45	754,175	52,375	6.94	(29,302)	
3302	BARNT GREEN ST. ANDREW'S C.E. FIRST	1,232,503	71,557	5.81	1,337,323	26,199	1.96	(45,358)	
3001	BAYTON C.E. PRIMARY	713,233	35,658	5.00	718,252	10,247	1.43	(25,411)	
3002	BELBROUGHTON C.E. PRIMARY & NURSERY	1,082,192	(11,930)	(1.10)	1,089,438	(97,745)	(8.97)	(85,815)	
2008	BEOLEY FIRST	667,667	69,045	10.34	679,676	58,601	8.62	(10,443)	
3011	BEWDLEY, ST ANNE'S CE PRIMARY	1,488,867	(859,003)	(57.70)	1,547,557	(943,090)	(60.94)	(84,087)	
3397	BEWDLEY PRIMARY	2,568,463	154,595	6.02	2,686,718	87,981	3.27	(66,614)	
3005	BLAKEDOWN C.E. PRIMARY	1,166,186	121,384	10.41	1,268,094	94,969	7.49	(26,414)	
3306	BREDON HANCOCK'S ENDOWED FIRST	952,933	(2,501)	(0.26)	1,061,060	35,539	3.35		38,040
3308	BROADWAS C.E. PRIMARY	681,576	(6,089)	(0.89)	807,066	(31,275)	(3.88)	(25,186)	
2013	BROADWAY FIRST	705,922	78,486	11.12	686,893	30,407	4.43	(48,079)	
2015	A BROMSGROVE, CATSHILL FIRST SCHOOL & NURSERY	1,878,558	(15,719)	(0.84)					15,719
2016	A BROMSGROVE, CHARFORD FIRST	3,036,963	194,205	6.39				(194,205)	
2017	BROMSGROVE, FINSTALL FIRST	1,643,339	109,228	6.65	1,743,653	118,517	6.80		9,289
2018	BROMSGROVE, LICKY END FIRST	905,636	(255,858)	(28.25)	981,836	(330,239)	(33.63)	(74,380)	
2019	BROMSGROVE, MEADOWS FIRST	2,335,121	168,036	7.20	2,605,596	163,218	6.26	(4,818)	
2020	BROMSGROVE, MILLFIELDS FIRST	1,915,379	244,494	12.76	2,006,419	291,817	14.54		47,323
2901	RUBERY, LICKY HILLS PRIMARY	2,717,317	3,960	0.15	2,816,820	(123,616)	(4.39)	(127,576)	
2022	A BROMSGROVE, BLACKWELL FIRST	1,194,148	117,827	9.87				(117,827)	
3330	CHADDESLEY CORBETT ENDOWED PRIMARY	1,815,790	165,235	9.10	1,947,300	48,229	2.48	(117,005)	
3018	CHURCH LENCH C.E. FIRST	634,706	88,611	13.96	622,688	80,813	12.98	(7,798)	
3019	CLAINES C.E. PRIMARY	1,254,465	(63,611)	(5.07)	1,356,528	(73,166)	(5.39)	(9,555)	
3020	CLEEVE PRIOR C.E. FIRST	422,057	77,106	18.27	360,965	49,661	13.76	(27,444)	
3022	CLENT PAROCHIAL PRIMARY	791,621	117,831	14.88	892,238	141,262	15.83		23,431
2032	CLIFTON-UPON-TEME PRIMARY	628,468	(61,129)	(9.73)	696,571	(54,991)	(7.89)		6,138
3016	COCKLEY SEBRIGHT ENDOWED PRIMARY	1,402,749	(18,665)	(1.33)	1,641,858	47,699	2.91		66,364
3027	CROPTHORNE-WITH-CHARLTON C.E. FIRST	712,880	(131,651)	(18.47)	639,595	(142,081)	(22.21)	(10,430)	
3029	DEFFORD-CUM-BESFORD C.E. FIRST	544,881	92,098	16.90	528,666	88,804	16.80	(3,294)	
2034	DODFORD FIRST	582,222	13,140	2.26	597,690	23,445	3.92		10,305
2035	DROITWICH, WESTLANDS FIRST	1,657,800	353,921	21.35	1,873,652	434,337	23.18		80,416
2036	DROITWICH, CHAWSON COMMUNITY FIRST	2,215,918	52,246	2.36	2,485,606	(23,366)	(0.94)	(75,612)	
3317	A DROITWICH, ST. JOSEPH'S CATHOLIC PRIMARY	1,295,870	25,921	2.00				(25,921)	
3038	ECKINGTON C.E. FIRST	602,155	125,677	20.87	648,464	111,822	17.24	(13,855)	
3039	ELDERSFIELD LAWN C.E. PRIMARY	731,152	61,989	8.48	799,564	76,397	9.55		14,408
3040	ELMLEY CASTLE C.E. FIRST	704,221	(128,871)	(18.30)	738,447	(143,889)	(19.49)	(15,017)	
3042	EVESHAM, ST RICHARD'S C.E. FIRST	1,875,159	79,924	4.26	2,154,372	178,228	8.27		98,304
3043	EVESHAM, ST ANDREW'S C.E. FIRST	2,169,792	134,090	6.18	2,473,665	40,957	1.66	(93,133)	
2041	EVESHAM, SWAN LANE FIRST	1,835,256	147,709	8.05	1,987,461	201,030	10.11		53,321
2047	FAIRFIELD FIRST	825,335	309,013	37.44	908,314	350,364	38.57		41,352
3324	FLADBURY C.E. FIRST	718,905	100,300	13.95	629,843	53,516	8.50	(46,784)	
5201	FLYFORD FLAVELL FIRST	875,847	158,994	18.15	938,901	138,971	14.80	(20,023)	
3048	GRIMLEY & HOLT C.E. PRIMARY	699,818	(15,077)	(2.15)	708,716	(65,634)	(9.26)	(50,557)	
2055	HAGLEY PRIMARY	3,541,450	941,818	26.59	3,749,558	840,397	22.41	(101,421)	
3329	HALLOW C.E. PRIMARY	1,147,714	(67,967)	(5.92)	1,119,327	(287,747)	(25.71)	(219,780)	
3049	HANBURY C.E. FIRST	1,002,588	173,502	17.31	1,094,117	236,048	21.57		62,546
3053	HARVINGTON C.E. FIRST	1,281,033	101,257	7.90	1,364,515	143,070	10.49		41,813
3056	HIMBLETON C.E. FIRST	733,935	48,051	6.55	799,149	94,172	11.78		46,121
3057	HINDLIP C.E. FIRST	616,342	28,773	4.67	723,264	39,056	5.40		10,283
2907	KIDDERMINSTER, COMBERTON PRIMARY	2,505,950	264,896	10.57	2,533,675	164,513	6.49	(100,382)	
2910	KIDDERMINSTER, FRANCHE COMMUNITY PRIMARY	5,437,474	434,446	7.99	5,958,597	399,976	6.71	(34,470)	
2911	KIDDERMINSTER, OFFMORE PRIMARY	2,004,739	(199,297)	(9.94)	2,442,012	(88,253)	(3.61)		111,044
3021	KIDDERMINSTER, ST CATHERINE'S CE PRIMARY	2,249,715	137,716	6.12	2,443,235	195,903	8.02		58,187
3331	KIDDERMINSTER, ST MARY'S CE PRIMARY	1,685,853	271,821	16.12	1,776,927	307,356	17.30		35,534
3350	LINDRIDGE ST. LAWRENCE'S C.E. PRIMARY	751,709	(57,336)	(7.63)	789,679	(35,380)	(4.48)		21,955
3358	MALVERN, ST. JOSEPH'S CATHOLIC PRIMARY	937,375	38,757	4.13	878,037	(18,071)	(2.06)	(56,829)	
3359	MALVERN WELLS C.E. PRIMARY	645,647	(24,946)	(3.86)	683,717	(40,636)	(5.94)	(15,690)	
3360	WEST MALVERN ST JAMES' C.E. PRIMARY	525,414	98,428	18.73	480,917	82,058	17.06	(16,370)	
3074	MALVERN, WYCHE C.E. PRIMARY	851,093	44,309	5.21	865,458	(6,747)	(0.78)	(51,056)	
3400	MALVERN, THE GROVE PRIMARY	1,088,738	(130,079)	(11.95)	1,108,295	(304,655)	(27.49)	(174,576)	
3365	OMBERSLEY ENDOWED FIRST	962,184	(3,852)	(0.40)	1,124,370	31,306	2.78		35,158
3084	OVERBURY C.E. FIRST	645,601	205,963	31.90	668,127	190,497	28.51	(15,466)	
2118	PEEWORTH FIRST	373,382	68,705	18.40	347,019	46,951	13.53	(21,754)	
3085	PENDOCK C.E. PRIMARY	538,620	18,478	3.43	584,901	41,203	7.04		22,724
2119	PERSHORE, ABBEY PARK FIRST & NURSERY	1,233,274	32,810	2.66	1,466,691	131,869	8.99		99,059
3368	PERSHORE, HOLY REDEEMER CATHOLIC PRIMARY	1,276,770	69,682	5.46	1,350,868	35,143	2.60	(34,539)	
2128	REDDITCH, BATCHLEY FIRST	2,217,332	369,633	16.67	2,284,782	205,140	8.98	(164,492)	
2192	REDDITCH, MOON'S MOAT FIRST	1,412,404	502,215	35.56	1,543,025	520,021	33.70		17,807
3093	A REDDITCH, ST. LUKE'S C.E. FIRST	1,143,947	73,538	6.43				(73,538)	
2136	REDDITCH, TENACRES FIRST	1,704,115	212,726	12.48	1,815,575	208,412	11.48	(4,314)	
2137	REDDITCH, WOODROW FIRST	2,037,735	(22,706)	(1.11)	2,125,700	(6,487)	(0.31)		16,219
3097	ROMSLEY, ST. KENELM'S C.E. PRIMARY	1,273,414	30,890	2.43	1,393,967	53,503	3.84		22,613
2921	A RUBERY, HOLYWELL PRIMARY & NURSERY	2,472,443	154,561	6.25				(154,561)	
3099	SEDBERROW C.E. FIRST	1,069,851	164,076	15.34	1,216,630	142,155	11.68	(21,921)	
2147	STOKE PRIOR FIRST	895,554	10,508	1.17	974,190	28,653	2.94		18,146
3381	SYCHAMPTON ENDOWED FIRST	821,856	(42,772)	(5.20)	809,172	767	0.09		43,539
3382	TARDEBIGGE C.E. FIRST	834,046	85,435	10.24	880,640	46,877	5.32	(38,558)	
3105	TIBBERTON C.E. FIRST	535,468	57,672	10.77	583,116	72,091	12.36		14,419
3107	UPTON-UPON-SEVERN C.E. PRIMARY	1,400,563	(287,132)	(20.50)	1,353,383	(357,064)	(26.38)	(69,932)	
3108	UPTON SNOBSBURY C.E. FIRST	459,771	100,431	21.84	489,288	66,255	13.54	(34,176)	
3110	WHITTINGTON C.E. PRIMARY	1,238,735	135,818	10.96	1,289,266	161,516	12.53		25,697
3387	A WORCESTER, OUR LADY QUEEN OF PEACE CATHOLIC	1,094,306	97,310	8.89				(97,310)	
2200	WORCESTER, PITMASTON PRIMARY	3,570,324	335,348	9.39	3,930,481	428,649	10.91		93,301
3114	WORCESTER, ST. BARNABAS C.E. PRIMARY	2,618,125	(162,794)	(6.22)	2,933,107	(296,344)	(10.10)	(133,549)	
3116	WORCESTER, RED HILL C.E. PRIMARY	2,302,350	(367,372)	(15.96)	2,543,359	(93,853)	(3.69)		273,519
3389	A WORCESTER, ST. GEORGE'S C.E. PRIMARY	1,059,314	84,220	7.95				(84,220)	
3390	A WORCESTER, ST. GEORGE'S CATHOLIC PRIMARY	1,197,871	37,286	3.11				(37,286)	
3391	A WORCESTER, ST. JOSEPH'S CATHOLIC PRIMARY	2,486,121	(34,295)	(1.38)					34,295
2188	WYTHALL, MEADOW GREEN PRIMARY	1,696,064	837	0.05	1,853,162	(7,590)	(0.41)	(8,427)	
2906	PERSHORE, ABBEY PARK MIDDLE	1,018,145	99,421	9.76	1,132,158	63,481	5.61	(35,940)	
2197	RUBERY, BEACONSIDE PRIMARY & NURSERY	1,462,728	152,375	10.42	1,506,890	92,359	6.13	(60,016)	
2916	DROITWICH, WESTACRE MIDDLE	2,818,895	470,263	16.68	3,125,516	543,088	17.38		72,824
	TOTAL NURSERY & PRIMARY	129,831,583	6,772,655	5.22	121,134,342	4,948,860	4.09	(3,532,315)	1,708,520
	SECONDARY SCHOOLS								
4401	BROMSGROVE, ASTON FIELDS MIDDLE	3,516,929	(97,204)	(2.76)	3,734,224	(91,412)	(2.45)		5,791
4402	A BROMSGROVE, CATSHILL MIDDLE	2,587,314	192,460	7.44				(192,460)	
4403	BROMSGROVE, PARKSIDE MIDDLE	4,104,488	108,760	2.65	4,411,223	(70,516)	(1.60)	(179,276)	
4408	EVESHAM, BLACKMINSTER MIDDLE	1,728,570	(310,016)	(17.93)	1,984,434	(280,453)	(14.13)		29,563
4576	EVESHAM, ST. EGWIN'S C.E. MIDDLE	2,875,012	375,084	13.05	3,155,866	284,696	9.02	(90,388)	

Appendix A Schools' Carry-forward analysis 2022/23 & 2023/24									
Cost Centre	School	Total Resources 2023/24*	2023/24 CFWD inc interest		Total Resources	2024/25 CFWD inc interest		Movement	
4001	THE BEWDLEY SCHOOL & SIXTH FORM	6,999,657	211,801	3.03	7,429,137	228,972	3.08		17,171
4503	Wolverley Ce Secondary	7,153,061	(2,909,442)	(40.67)	7,551,887	(3,040,842)	(40.27)	(131,400)	
5402	Worcester, Blessed Edward Oldcome Catholic College	7,129,448	831,185	11.66	7,762,257	683,437	8.80	(147,748)	
	TOTAL SECONDARY	36,094,480	(1,597,371)	-4.43	36,029,029	(2,286,117)	-6.35	(741,271)	52,525
	SPECIAL SCHOOLS								
7015	BROMSGROVE, CHADSGROVE	5,620,381	1,271,005	22.61	5,684,996	1,076,852	18.94	(194,154)	
7001	BROMSGROVE, RIGBY HALL	4,115,916	928,829	22.57	4,656,194	1,049,425	22.54		120,596
7026	Wyre Forest New Special School	7,687,487	731,654	9.52	8,782,344	683,934	7.79	(47,721)	
7025	FORT ROYAL COMMUNITY PRIMARY	5,749,635	869,128	15.12	6,102,123	585,377	9.59	(283,751)	
	TOTAL SPECIAL	23,173,420	3,800,616	16.40	25,225,656	3,395,587	13.46	(525,625)	120,596
	PRU'S								
1103	PERRYFIELDS PRIMARY SCHOOL	1,113,470	184,812	16.60	1,219,884	202,298	16.58		17,486
1121	THE FORGE SECONDARY SCHOOL	1,307,819	(77,413)	(5.92)	1,609,594	(54,478)	(3.38)		22,935
1105	THE BEACON PRIMARY SCHOOL	786,409	288,103	36.64	684,953	236,970	34.60	(51,134)	
	TOTAL SPECIAL	3,207,697	395,503	12.33	3,514,430	384,790	10.95	(51,134)	40,421
	TOTAL DELEGATED BUDGETS	192,307,181	9,371,403	4.87	185,903,456	6,443,120	3.47	(4,850,345)	1,922,062
	B = Bank account school								
	O = Opening school/Newly delegated school								
	C = Closed school								
	A = Academy								
	* Total Resources does not include carry-forward.								

Report to the Worcestershire Schools Forum (WSF) Pupil Premium Plus (PP+) Funding

1. Purpose

- 1.1 To increase the proportion of the Pupil Premium Plus grant utilised by schools/settings for Children Looked After.

2. Context

Raising the attainment of Children Looked After is a key priority and it is a responsibility shared by the Local Authority, schools, and their partners in the community. Children facing disadvantage are eligible for Pupil Premium. Pupil Premium Plus (PP+) is specifically for Children Looked After. This is a key resource, and used effectively, it will diminish the difference in outcomes between disadvantaged children and their peers. Pupil Premium Plus provides additional funding for virtual schools to support and help raise the educational attainment and progress of their Children Looked After pupils.

The Virtual School devolves the majority of this funding to our pupils (£550 per term, thus £1,650 per academic year). It works, through the Personal Education Plan process, with designated teachers, social workers, and carers to target and utilise this funding effectively to improve educational outcomes. The Virtual School also centrally retains a portion of PP+ to fund projects to benefit all of Worcestershire's Children Looked After.

Schools may apply for additional funding to meet the needs of an individual child or to raise the achievement of Children Looked After in their school, to improve their outcomes. Equally, some clusters of schools or early years providers may have a proposal for using PP+ for the benefit of Children Looked After in the locality. For Previously Looked After Children, schools are also entitled to claim £2,570 per annum, which is sent directly to schools.

PP+ funding can be used to facilitate a wide range of educational support for Children Looked After. It is important that interventions supported by PP+ should be evidence-based and in the best interests of the child.

Components of Pupil Premium

There are several components within Pupil Premium funding that relate to CLA or Previously Looked After Children (PLAC):

- Pupil Premium for CLA is known as **Pupil Premium Plus (PP+)**. For Worcestershire CLA this is distributed via Worcestershire Virtual School, in arrears at the end of each term.
- Pupil Premium for 'rising 3-year olds' is referred to as **Early Years Pupil Premium**. For Worcestershire CLA this is distributed via Local Authority Finance Team, in collaboration with the Virtual School.
- Pupil Premium for children who have **left Care** via Adoption Order, Child Arrangement Order or Special Guardianship Order is known as **Previously Looked After Pupil Premium**. This is paid directly to schools. (See 'Eligibility for Previously Looked After Children Pupil Premium').

Related content:

- [WVS Pupil Premium Plus Policy 2024 to 2025 \(PDF\)](#)
- [Pupil premium: overview - GOV.UK](#)
- [Pupil premium: conditions of grant for the 2025 to 2026 financial year - GOV.UK](#)
- [Pupil premium: virtual school heads' responsibilities - GOV.UK](#)

- [Designated teacher for looked-after and previously looked-after children - GOV.UK](#)
- [Promoting the education of looked-after and previously looked-after children - GOV.UK](#)

3. Key Information

Worcestershire Virtual School wants all PP+ available to schools to be utilised by schools to support their Children Looked After. As outlined above, this funding is allocated through the PEP process. Additional funding is also available to schools where required, through an Additional Funding Request.

The following table outlines the amount of PP+ available to schools (calculated by multiplying £1,650 per pupil by the number of pupils), compared with how much was actually utilised by schools.

	2025/26 financial year <i>(Indicative)</i>	2024/25 financial year	2023/24 financial year	2022/23 financial year	2021/22 financial year
Total PP+ available to schools for CLA	£1,188,000	£1,188,000	£1,136,850	£1,057,650	£991,650
Total PP+ utilised by schools for CLA	£728,207	£654,034	£477,710	£453,050	£466,204
% of available funds used by schools	61%	55%	42%	43%	47%

In 2024/25 55% of the PP+ available to schools was utilised by schools.

For 2025/26 we are projecting 61% to be utilised.

Worcestershire Virtual School continuously encourages schools to use the PP+ funds made available via the PEP process and are keen for take up to increase.

4. Recommendation

This information is presented to Schools Forum for transparency and to seek support with increasing the proportion of PP+ utilised by schools to support their Children Looked After.

Matthew Stiles
Education Engagement Lead & Virtual School Headteacher
Worcestershire County Council
October 2025

REPORT TO THE WORCESTERSHIRE SCHOOLS FORUM (WSF)
Section 19 Funding

1.0 PURPOSE

To clarify funding arrangements for pupils who meet the criteria for Section 19 support in Worcestershire.

2.0 Context

Section 19 of the [Education Act 1996](#) states:

*'Each local authority in England shall make arrangements for the provision of suitable education at school or otherwise than at school for those children of compulsory school age who, by reason of **illness**, **exclusion** from school or **otherwise**, may not for any period receive suitable education unless such arrangements are made for them.'*

Additionally, [Arranging education for children who cannot attend school because of health needs](#) clarifies that, for children with medical conditions who can attend school, 'The local authority does not need to become involved in such arrangements unless it has reason to believe that the education being provided by the school is unsuitable' (or unsustainable).

The Section 19 duty placed on Local Authorities relates to those of compulsory school age – Children and Young People aged 5 to 16 (from school term after a child's 5th birthday, until the last Friday in June of the school year they turn 16).

Related content:

- WCC's [Section 19 Policy](#)
- Section 19 of the [Education Act 1996](#)
- Section 100 of the [Children and Families Act 2014](#) - The appropriate authority for a school to which this section applies must make arrangements for supporting pupils at the school with medical conditions.
- DfE guidance [Arranging education for children who cannot attend school because of health needs](#)
- DfE guidance [Supporting pupils with medical conditions at school](#)
- DfE guidance on [Working together to improve school attendance](#)
- WCC's [Inclusion in Educational Settings](#) webpages

3.0 Key Information

3.1 Exclusion:

Budget adjustments for permanent exclusions from school are defined as follows

The Legal Framework for Maintained Schools

The legal framework for maintained schools is set by section 47 of the [School Standards and Framework Act 1998](#) and regulation 37 of [The School and Early Years Finance \(England\) Regulations 2023](#), where regulation 37 requires a local authority to make an adjustment to the delegated budget for a maintained mainstream school where a pupil is permanently excluded from that school.

The Funding Regulations provide the relevant statutory formula which determines the amount by which the delegated budget must be adjusted.

Additions to the admitting school's budget - Where a mainstream maintained school admits a pupil who has previously been permanently excluded, the local authority must increase the school's budget in-year.

The Legal Framework for Academies

The legal framework for academies is set by their funding agreement which provides that mainstream academies and special academies which admit pupils without statements of special educational needs must, if asked by a local authority, enter into an agreement (the "Exclusion Agreement") which has the effect that, where:

- the academy admits a pupil who has been permanently excluded from a maintained school or from an academy with whom the local authority has a similar agreement or*
- the academy permanently excludes a pupil the arrangements for payment will be the same as if the academy were a maintained school under the Funding Regulations. In other words, the budget for that academy will be adjusted so the balance of funding follows the permanently excluded pupil to another school or academy or to alternative provision.*

The amount by which the budget must be adjusted should accordingly follow the statutory formula for maintained mainstream schools in the Funding Regulations.

References:

- [Can a local authority charge a school or academy where it excludes a pupil? - Wrigleys Solicitors LLP](#)*
- [Schools operational guide: 2025 to 2026 - GOV.UK](#)*
- [School Standards and Framework Act 1998](#)*
- [The School and Early Years Finance \(England\) Regulations 2023](#).*

3.2 'Illness' & 'Otherwise':

Section 10.1 of WCC's [Section 19 Policy](#) states:

10.1 In line with DfE guidance referenced below, where the Local Authority assumes responsibility for the education of a child under Section 19, this will be funded from local authorities' high needs budgets. However, where a child remains on the roll of their school but requires a period of time with support outside of school, the local authority may request a transfer of a portion of the pupil's funding from their school. Alternatively, an agreement to fund different elements of the package between the LA and the pupil's school may be agreed. This would ensure that the funding follows the child. This arrangement would cease when the child is reintegrated back to their home school or are no longer on the roll of the home school. Funding will also cover transport and assessments where appropriate and not superseded by other policies, guidance or legislature.

[Arranging education for children who cannot attend school because of health needs](#) (DfE Dec 2023)

Alternative provision for children with medical needs is funded from local authorities' high needs budgets. However, where a child remains on the roll of their home school but requires a period of time in alternative provision due to their health needs, the local authority and home school may wish to consider the transfer of a portion of the school's funding associated

with that child to the alternative provision. This would ensure that the funding follows the child. This arrangement would cease when the child is reintegrated back to their home school or are no longer on the roll of the home school.

When a child permanently leaves the roll of their home school and is admitted to another school or alternative provision, a mandatory funding adjustment is made by the local authority. Details of these adjustments are set out in the 'Redetermination of budgets' sections of the 'Schools operational guide' on the web page entitled 'Pre16 schools funding: local authority guidance' for the relevant financial year, a link to which can be found in the following web page: [Local authorities: pre-16 schools funding - GOV.UK](https://www.gov.uk/guidance/local-authorities-pre-16-schools-funding)

Local authorities should always ensure that alternative provision is good value for money.

Medical Education Team funding:

The MET forms part of WCC's response to 'illness' under Section 19. The MET service is subsidised by WCC with MET costings based on % AWPU to ensure that there are funds available. Funding for MET was historically agreed at Schools Forum, as follows:

- Maintained Schools/Academies: Recoupment will be applied at the rate of 80% of the AWPU received by the school for each individual pupil taught.
- Independent and Out of Authority Schools: A weekly charge, equal to 80% of the AWPU and in line with the charging policy for WCC schools.
- Recoupment/charging for all schools will apply for the duration of tuition.

6.0 RECOMMENDATION

- 6.1 The WSF notes and discusses the above position.

Matthew Stile
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Worcestershire County Council
October 2025