

Schools Forum Governance Improvement

Date: 26 June 2025	Item 6	Type of report: Approval
Report title:	Schools Forum Governance Improvement Task and Finish Group – Final Report	
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PURPOSE OF THE REPORT

1. This report concludes the work of the Schools Forum Governance Improvement Task and Finish Group, outlining the successful completion of the agreed actions and future business as usual tasks embedding the established governance arrangements to ensure that the Schools Forum continues to operate as an effective decision making and consultative group, supporting the council in its statutory responsibilities in allocating the Dedicated Schools Grant (DSG).

RECOMMENDATIONS

Schools Forum is asked to:

2. Note the successful conclusion of the Governance Improvement programme;
3. Agree to disband the Task and Finish group; and
4. Comment on the business as usual activity, noting the inclusion of an
 - ongoing training programme; and
 - annual review of the clerking specification; arrangements and resource requirements.

BACKGROUND INFORMATION

5. During 2024, a comprehensive review of schools forum governance was undertaken on the basis of the DfE's [Schools Forum operational and good practice guide](#) and using the [self-assessment checklist](#) as a guide, in addition to obtaining views on the current operation of the schools forum were obtained from officers and schools forum members.
6. Following the review, schools agreed that essential to the successful delivery of the improvements required, a time limited Governance Improvement Task and Finish Group of the Schools Forum would be constituted to ensure that appropriate actions were taken to:

- Increase the understanding of the schools forum's role and capacity to assist in making high quality decisions;
 - Encourage active attendance and wide engagement of all sectors in discussion;
 - Support effective structure of meetings, including feedback from established schools forum subgroups and voting; and
 - Ensure proactive preparation of agenda and papers.
7. Schools Forum approved the group's Terms of Reference, attached at **Appendix 1**, in September 2024.
 8. Since then, the group has met a number of times to review the progress of the agreed Improvement Plan, attached at **Appendix 2**, providing regular updates to the Schools Forum.

KEY ISSUES FOR CONSIDERATION

9. Whilst the Improvement Plan contained, primarily, one-off improvement tasks, many of the actions now require embedding as business as usual activity alongside clear lines of responsibility.
10. For too long, the Education Finance function has been responsible for the servicing (with the exclusion of clerking) of the Schools Forum as well as being almost entirely responsible for the business side of the Forum with little input from the Education service in respect of the delivery of education functions. Now that there is an enhanced clerking service in place, it is an opportune time to split those functions that support the effective structure and operation of Schools Forum meetings and those relating to the technical and financial side of the Schools Forum's role - moving away from the transactional nature of Schools Forum decision making.
11. In addition, whilst some reports have been presented to the Schools Forum in the past year specifically relating to delivery of services that are funded by DSG, more can be done to support the Schools Forum understanding of how the centrally retained and de-delegated DSG elements are spent by the council and the outcomes achieved - thus, enabling enhanced scrutiny and accountability.

Improvement outcomes

12. As can be seen in the Improvement Plan (**Appendix 2**), almost all activity has been completed successfully - the exception being the delivery of technical training to members. Whilst induction training was provided in December 2024, a fuller training programme has now been developed and will become a regular offer to members from October 2025 (more on this below).

Business as usual activity

13. Using the same themes identified in the Improvement Plan, the following sections outline the necessary business as usual activity required to maintain the

governance improvements secured in the past year. A summary of the tasks, including the responsible officer, is attached at **Appendix 3**.

Workstream 1: Constitution and procedural issues

14. Prior to September 2024, there was no publicly accessible written Schools Forum constitution outlining the terms of reference, membership or operating principles of the Schools Forum which hindered active attendance and wide engagement of all schools sectors in discussion and meaningful consultation.
15. It is essential that the constitution is reviewed, refreshed and adopted annually at the first meeting of the academic year (October), specifically updating the proportional representation of academy and maintained school members in accordance with pupil numbers, if required.
16. To further support this, prior to the last meeting of the academic year in June, sitting members whose terms of office have ceased (in accordance with the Constitution) must be notified that the position will be declared as a vacancy. The same members can be reappointed providing they are re-elected/ nominated again by the group that they represent.
17. All membership vacancies will be declared at the June Schools Forum meeting (and the website updated, accordingly) and the clerk will actively recruit additional representative membership, in accordance with the Constitution, with 'new' members confirmed by the commencement of the next academic year.
18. Within the same timeframes, the Terms of Reference for the agreed Schools Forum subgroups must be reviewed, refreshed and adopted, including the membership as set out below:
 - High needs subgroup – based on the same representative proportions as the Schools Forum and chaired by a Forum member; and
 - Schools' financial support panel – based on nominations and chaired by a member of the Schools Forum.

Workstream 2: Training

19. To increase the understanding of the Schools Forum's role and capacity to assist in making high quality decisions, a training programme has been developed with LA governance/finance officers to help develop understanding and knowledge of roles and responsibilities of members.
20. A draft training programme was presented at the March meeting, consulting members on the proposed content, method of delivery and timetable. Broadly, members welcomed the proposed programme, its availability to all members (including subgroup members) with a preference for the training to be held in conjunction with Schools Forum meetings, either before the scheduled meeting or as a standard agenda item. This proposal works well for the induction

elements but due to the statutory decision making timetable, delivery of the finance elements cannot be delayed until the December or January meetings.

21. The two induction elements (Regulatory Framework and Role and Powers of Schools Forum) of the training programme should be delivered before the formal business of the first Schools Forum meeting of the academic year (October).
22. The two finance elements (Schools Block - Funding Formula and Central, Early Years and High Needs Blocks) will be delivered together during November in a virtual session which will be recorded and made available on GovernorHub for those members that cannot attend to access before the December Schools Forum.
23. The current Training Programme is attached at **Appendix 4**. Training should be offered to all Schools Forum and subgroup members and each session should include programme evaluation and an assessment of additional training needs.

Workstream 3: Facilitating engagement

1. To continue to support the effective structure of meetings, the constitution includes clear service standards regarding setting the meeting cycle with an accompanying forward plan alongside the availability of forum papers, decision logs and draft minutes.
2. There is an agreed schedule of meetings that requires replication each year to ensure the business of the Schools Forum can be conducted within the timeframes required for statutory decision making. This timetable, in addition to lead in times for the various steps for approval of final Schools Forum papers and publication of decisions and minutes, should be revised before the last meeting of the academic year and presented to the June Schools Forum. The schedule for the 2025/26 academic year is attached at **Appendix 5**.
3. Alongside the standard agenda, there is an established forward plan and, at each Schools Forum meeting, a report must be presented outlining the draft agenda for the following meeting (which acts as approval by the Chair) and the forward plan. Following approval, this report should be shared with relevant SELA officers to ensure it is included as an agenda item at the Headteacher breakfast briefings and specific school sector meetings.
4. LA officers will be responsible for the journey of all draft papers, including previous meeting minutes and Schools Forum subgroup minutes/actions, up to and including the relevant Children's Services Leadership Team (CSLT) meeting – this will be facilitated by the Education Finance team. Following any required amendments to be made by the authors, the Clerk should support the papers through to the Chairs' pre-meet and final distribution on GovernorHub in accordance with the service standards. Any amendments required following the pre-meet will need to be completed by the authors and all reports must be completed using the standard Schools Forum template.

5. In addition to the dedicated Schools Forum website, all Schools Forum meetings for the academic year will be included on the council's Calendar of Meetings. The final meeting of the 2024/25 academic year is located @ [Monthly meetings calendar - June 2025 - Southwark Council](#).

Workstream 4: Clerking

6. To support the effective structure and operation of schools forum meetings, key tasks should be carried out by the clerk. Broadly, the clerk is responsible for managing the schools forum logistics, including the publication of papers and recording minutes, the decision and action log. These essential routine tasks, many of which are mentioned above, are all covered in **Appendix 3**.

Workstream 5: Decision- making

7. Whilst the schools forum has a statutory consultative and advisory role in respect of school funding, the responsibility for determining and approving the schools' funding formula rests with the chief finance officer (Strategic Director of Resources), as outlined in section 15.1.2 of the council's financial standing orders.
8. As the funding formula provides the resources to primary and secondary schools to provide education, there remains a strong service element to the decision and the Strategic Director of Resources should make that decision in consultation with the Director of Children's Services (DCS).
9. As such, the report, requesting the decision be made by the Strategic Director of Resources, is a report of the DCS in recognition of the consultation undertaken between the two Chief Officers.
10. **Appendix 6** outlines the report content and process, with critical dates, to enable a decision to approve the following financial year's schools' funding formula to be made before (approximately) 20 January each year (the date of the Authority Proforma Tool submission).

Annual review

11. Finally, to ensure sustained improvement of Schools Forum governance and the continued effective operation, the business as usual activity includes a scheduled annual review of the clerking specification, arrangements and budget available to the Schools Forum for the servicing of the Forum in sufficient time to secure any additional resource requirements from the Central Schools Services Block.

CONCLUSION AND NEXT STEPS

12. As almost all activity contained in the improvement plan has been completed successfully, the Governance Improvement Task and Finish Group can be disbanded with the final meeting held on 12 May 2025.

13. The only activity not successfully completed was the training programme delivery and has now been included in business as usual activity as well as an annual review of the clerking specification, arrangements and resource requirements.

APPENDICES

- Appendix 1: Task & Finish Group Terms of Reference 2024/25
- Appendix 2: School Forum Governance Improvement Plan
- Appendix 3: Business as Usual Activity
- Appendix 4: Training Programme
- Appendix 5: Meeting Schedule, with lead in times
- Appendix 6: DSG Schools Funding Formula – Decision Making Process

1. Purpose of the Task and Finish Group

Southwark Council's Schools Forum has an important role to play in the delivery of education in the borough, and it is important that clear and appropriate governance structures are in place to maximise its effectiveness as a decision making and consultative group.

Following a governance review at the beginning of the 2024-25 financial year it was agreed that essential to the successful delivery of the improvements recommended, a time limited Governance Improvement Task and Finish Group of the Schools Forum would be constituted to ensure that appropriate actions were taken to:

- increase the understanding of the Schools Forum's role and capacity to assist in making high quality decisions;
- encourage active attendance and wide engagement of all sectors in discussion and meaningful consultation;
- support effective structure of meetings, including feedback from established schools forum subgroups and voting; and
- ensure proactive preparation of agenda and papers.

The Governance Improvement Task and Finish Group supports the wider transformation agenda that aims to enable clarity of process and consistent decision making and assist the council in the delivery of its statutory responsibilities in respect of allocating the Dedicated Schools Grant (DSG).

2. Responsibilities

The Governance Improvement Task and Finish Group is responsible for the delivery of Schools Forum Governance Improvement Plan (to be completed and attached at Appendix A); ensuring that each action:

- has an assigned responsible officer; and
- is completed within the timescales indicated.

3. Membership

One Schools Forum representative.

Local Authorities Officers:

- Director of Children's Services, or their representative
- Southwark Education Learning and Achievement (SELA) representative
- Senior Finance Manager (Education), or their representative
- Schools Forum clerk.

Members, as at 01-10-2024

Name	Role
Alasdair Smith	Director of Children's Services
Donna-Marie Muir	Southwark Education Learning and Achievement
Kate Bingham	Education Finance
Hayley Furniss	Schools Forum Clerk
Pia Longman	Schools Forum Co-chair

4. Chairing Meetings

The Director of Children's Services (or their representative) will chair the meeting.

5. Duties of Members

All subgroup members will commit to:

- (ii) full attendance at all meetings. If members cannot attend, they must nominate an appropriate deputy to attend on their behalf;
- (iii) to contribute fully and provide expert advice, knowledge and insights to deliver the subgroup's responsibilities;
- (iv) complete any assigned actions by the agreed deadline.

6. Conduct and frequency of meetings

This group will meet at least four times (bi-monthly from October 2024) during the 2024/25 academic year, in October, December, February and April, with more frequent meetings if necessary.

The Governance Improvement Task and Finish Group will wish to arrive at decisions by consensus; where this is not possible the paper to the Schools Forum will record the differing views.

7. Timescales

It is intended that the Governance Improvement Task and Finish Group will be a time limited sub group of the Schools Forum, and as such will continue in operation, in this form, for the duration of the 2024/25 academic year.

If it is proposed to go beyond this date, the Schools Forum will agree the Governance Improvement Task and Finish Group terms of reference annually.

8. Expected Outputs

The Governance Improvement Task and Finish Group is not a decision-making group and will:

- a. report a briefing note to Schools Forum which offers an update on progress after each Governance Improvement Task and Finish Group meeting (Chair's responsibility), including (draft) minutes and papers (excluding papers of a confidential nature);
- b. make recommendations to Schools Forum, where necessary;
- c. identify risks and issues to achieving the objectives of the Schools Forum Governance Improvement Plan.

9. Version Control

19 September 2024	Terms of Reference adopted by Schools Forum
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Key Consideration / Ref		Action	Responsible Officer	Timescale	Progress
Workstream 1:		Encourage active attendance and wide engagement of all sectors in discussion and meaningful consultation			
Constitution and procedural issues	1.1	Present draft constitution to Schools Forum (SF) and request comments by 12/07/2024 (no comments rec'd))	KB	13/06/2024	Complete
	1.2	Confirm Lead member attendance at SF meetings (see 1.7)	KB	28/08/2024	Complete
	1.3	Recommend Constitution and Terms of Reference to SF for adoption, including revised Terms of Reference for High Needs Subgroup; Schools Financial Support Panel and Governance Improvement Subgroup	KB	19/09/2024	Adopted
	1.3 a	Confirm college representation at HNSG	KB	31/10/2024	Complete – added to ToR
	1.3 b	Confirm HNSG meeting schedule	KB	31/10/2024	Complete – added to ToR
	1.3 c	Ensure formatting of SFSP ToR includes all boxes are complete and attach appendices to final ToR	KB	31/10/2024	Complete
	1.3 d	Confirm number of SF reps on Governance Improvement Task and Finish Group	KB	31/10/2024	Complete
	1.3 e	Confirm LA officer membership on Governance Improvement Task and Finish Group	KB	31/10/2024	Complete
	1.3 f	Arrange Governance Improvement Task and Finish Group meetings	KB	31/10/2024	Complete
	1.3 g	Virtual or F2F meetings, going forward	HF (BAU)	31/10/2024	Complete
	1.4	Codify process of ensuring the lead member (LM) is kept informed of the business of the SF.	KB (BAU)	31/10/2024	Complete – DCS & LM – mthly meetings
	1.5	Confirm preferred nomination process for each constituent representative group, as set out in the Constitution	HF	21/11/2024	Complete

Key Consideration / Ref		Action	Responsible Officer	Timescale	Progress
	1.6	Confirm duration of tenure for current SF members to determine if re-nomination/election is required, in accordance with the “Term of office” as set out in the Constitution	KB/DM/HF	05/11/2024	Complete
	1.7	Actively recruit additional representative membership, as set out in the Constitution in accordance with the “Election and appointment of schools and non-schools members sections” confirmed above.	KB/DM	21/11/2024	Complete
Workstream 2:		Increase the understanding of the Schools Forum’s role and capacity to assist in making high quality decisions			
Training	2.1	Develop a local SF Induction training programme, including content (using available online resources), presenter and annual timetable	KB	30/11/2024	Complete - delivered 12/12/24
	2.2	Add optional training element for all SF members on the Dedicated Schools Grant allocation and distribution, including content (using School Funding report presented to the Education and Local Economy Scrutiny Commission), presenter and annual timetable	KB	2025/26 AY	Delivery from October 2025
	2.3	Extend training invitation to all SF Subgroup members	HF	2025/26 AY	
	2.4	Deliver inaugural induction & technical training sessions (> vacancies filled / > 12/12 SF) Induction training delivered (12/12/24) Extended training programme to be developed	TBC	26/06/2025	Proposed training programme, including the method of delivery, presented to SF 20/03/2025 Final programme TBC

Key Consideration / Ref		Action	Responsible Officer	Timescale	Progress
Workstream 3:		Support effective structure of meetings, including feedback from established schools forum subgroups and voting			
Facilitating engagement	3.1	Ensure that the service standards, as set out in the Constitution in accordance with the “Operating principles” (including setting the meeting schedule, the forward plan, the availability of forum papers, decision logs and draft minutes) are specifically detailed in the Clerking service specification.	KB	06/09/2024	Complete, discussion with and emails to DM
	3.2	Make the necessary arrangements for the September Schools Forum to be face to face at Tooley Street	KB/Clerk	06/09/2024	
	3.3	Stand down those officers included in meeting invites that are not presenting papers	KB / Clerk	06/09/2024	
	3.4	Add Review of Membership and SF commissioned business as standard agenda items to be considered at each meeting.	KB	31/10/2024	Complete
	3.5	Add Training Programme to December forum meeting agenda and, from next year, the forward plan for the last meeting of the academic year	KB	31/10/2024	Complete
	3.6	Share the Schools Forum Forward Plan with relevant SELA officers to ensure it is included as an agenda item at the Headteacher breakfast briefings and specific school sector meetings	KB (then HF - BAU)	31/10/2024	Complete - Comms in bulletin a priority
	3.7	Include actual draft agenda, based on forward plan, in papers for all SF meetings (ensuring agreement by chair)	KB (then HF - BAU)	22/11/2024	Complete
	3.8	Make standard report template (based on council’s report template) available to all key officers	KB (then HF - BAU)	15/11/2024	Complete
	3.9	Arrange with Constitutional Services for Schools Forum meetings to be included on the council’s Calendar of Meetings with a link to the already established Schools Forum website page.	DM	02/05/2025	Complete

Key Consideration / Ref		Action	Responsible Officer	Timescale	Progress
	3.10	Update the Schools Forum website, as per Appendix 5 of the June Schools Forum paper; “Governance Review” and School Funding report presented to the Education and Local Economy Scrutiny Commission as a resource	DM	31/01/2025	Complete
	3.11	Establish SF group on Governor Hub for distribution of papers to members, 7 days prior to meeting / all papers to be uploaded to SF website by the day before each meeting.	DM	21/01/2025	Complete
Workstream 4:		Ensure proactive preparation of agenda and papers			
Clerking	4.1	Develop formal Schools Forum clerking service specification, using paragraph 36 to 38 of the June Schools Forum paper; “Governance Review” as a guide	KB	28/08/2024	Complete, see 3.1
	4.2	Approach Governor Services to provide enhanced clerking services	KB	28/08/2024	
	4.3	Determine additional resources required to be allocated from the DSG Central Schools Service Block (to be included in centrally retained services review)	KB / DM	30/11/2024	Complete
Workstream 5:		Statutory compliance			
Decision making	5.1	Enter Schools' Funding Formula 2025-26 as a Chief Officer (CFO) decision on the Finance and IT Forward Plan - complete	KB	16/07/2024	Complete
	5.2	Complete Equality Impact and Needs Analysis, to be cleared by Head of Equality Diversity and Inclusion and DCS and update for 25-26 NFF changes	KB	20/01/2025	Complete
	5.3	Draft Delegated Chief Officer decision on Schools' Funding Formula 2025-26, on behalf of the Director of Children's Services (DCS)	KB	20/01/2025	Complete
	5.4	Submit Delegated Chief Officer decision on Schools' Funding Formula 2025-26 to the Strategic Director, Resources for decision before 20/01/2025	KB	20/01/2025	Complete

	Task	Responsible Officer	When	How Often	Meeting Date
Constitution and Terms of Reference	<ul style="list-style-type: none"> Review Constitution, including terms of reference, membership and operating principles Review Schools Forum subgroups Terms of Reference, including membership and meeting schedule: <ul style="list-style-type: none"> High Needs Sub Group (liaise with Assistant Director, SEND and Inclusion) <ul style="list-style-type: none"> HNSG membership is also based on proportional pupil number representation and must be chaired by a Schools Forum schools member Schools Financial Support Panel (liaise with Heads of Schools HR) <ul style="list-style-type: none"> SFSP membership is on a nomination basis and must be chaired by a Schools Forum schools member 	Schools Forum Clerk	July	Annually	N/A
	<ul style="list-style-type: none"> Request formal adoption of the Schools Forum Constitution and subgroups Terms of Reference at the first meeting of the academic year (October) – even if the annual review does not require any amendments to the terms of reference, membership and operating principles (report required) Facilitate annual election of Schools Forum chair 	Schools Forum Clerk		Annually	October
Membership	<ul style="list-style-type: none"> Maintain the list of members on the Schools Forum Advise on membership issues in general Ensure contact details of all members are up to date Update each Schools Forum meeting on membership matters, including new members and vacancies, specifically notifying members whose term of office has expired Notify sitting members whose terms of office have ceased (in accordance with the Constitution) that the position will be declared as a vacancy at the next scheduled meeting of the Schools Forum (see membership table below), following the process endorsed by Schools Forum in June 2025: <ul style="list-style-type: none"> The clerk will write to the member to confirm that their term is expiring and to ask if they are willing to continue as a member. 	Schools Forum Clerk	Ongoing	As required	Every meeting

	Task	Responsible Officer	When	How Often	Meeting Date
Membership	<ul style="list-style-type: none"> The clerk will then write to the representative group to indicate there is a forthcoming vacancy and whether or not the existing member is willing to continue as a member and inviting nominations to fill the vacancy. If the existing member wishes to continue and there are no other nominations, the existing member's membership is extended for another term. If the existing member does not wish to continue and there is only one nomination for a vacancy, then that nominee is appointed for a term of office. If there are more nominations than vacancies, whether or not that includes the existing member, then the representative group will be asked to vote on who should represent them (<u>with one vote per school</u>). Assist with the co-ordination of nomination or election processes run by the constituent groups Confirm proportional representation of schools members at the last meeting of the academic year in June, in accordance with statutory guidance on Schools Forum Structure, based on the January school census data 	Schools Forum Clerk	Ongoing	As required	Every meeting
Meetings	<ul style="list-style-type: none"> Develop and maintain annual meeting schedule, with lead in times, in consultation with the Senior Finance Manager, Education (as per Appendix 5) Develop and maintain Forward Plan, in consultation with the Senior Finance Manager, Education Notify Schools Forum of the next academic year's meeting dates and Forward Plan 	Schools Forum Clerk	Ongoing	As required and at least annually	June
	<ul style="list-style-type: none"> Manage schools forum logistics, including room bookings, catering, place names and set up 	Governor Services Co-ordinator	Ongoing	As required	Every meeting
	<ul style="list-style-type: none"> Manage Chairs' pre-meet logistics, including scheduling Teams meetings and distribution of draft papers Distribute final Schools Forum papers via GovernorHub to Schools Forum members one week in advance of the meeting date Record minutes, decision log and maintain action log 	Schools Forum Clerk	Ongoing	As required	Every meeting

	Task	Responsible Officer	When	How Often	Meeting Date
	<ul style="list-style-type: none"> Publish the decision/action log within three working days of the meeting and draft minutes within 10 working days of the meeting. 				
	<ul style="list-style-type: none"> Upload final Schools Forum papers to Schools Forum website one week in advance of the meeting date 	Governor Services Co-ordinator	Ongoing	As required	Every meeting
Schools Forum Papers	<p>Children's Services Leadership Team (CSLT) meeting</p> <ul style="list-style-type: none"> Submit request for inclusion of draft Schools Forum papers on CSLT Forward Plan Ensure all draft Schools Forum papers, listed in draft Agenda and Forward Plan, are available for distribution one week prior to the scheduled CSLT meeting (including minutes and forward plan report from the Clerk, HNSG minutes and SFSP decision summary) Support other LA officers, including providing the SF report template, presenting SF papers Co-ordinate any amendments required, as a consequence of the CSLT discussions Forward draft papers to SF Clerk, for Chairs' pre-meet distribution Facilitate any report amendments required prior to finalising SF papers Where decisions are required by the Schools Forum, prepare a decision and voting requirements table for the clerk and chair/s, including: report and paragraph reference; action required; and the decision makers (which SF members) 	Senior Finance Manager, Education	Ongoing	As required	Every meeting
Schools Forum Papers	<p>For Children's Services Leadership Team (CSLT) meeting</p> <ul style="list-style-type: none"> Confirm draft agenda, in consultation with the Senior Finance Manager, Education Complete Draft Agenda and Forward Plan report Ensure previous meeting's minutes are available <p>Following Children's Services Leadership Team (CSLT) meeting</p> <ul style="list-style-type: none"> Distribute draft papers to Chairs for pre-meet, in accordance with meeting schedule at Appendix 5 Distribute final Schools Forum papers one week before the meeting (see above) 	Schools Forum Clerk	Ongoing	As required	Every meeting

	Task	Responsible Officer	When	How Often	Meeting Date
Communications	<ul style="list-style-type: none"> Provide the route by which schools forum members can access further information and co-ordinate communication to schools forum members outside of the formal meeting cycle Respond to any queries about the business of the schools forum from headteachers, governors and others who are not on the schools forum themselves 	Schools Forum Clerk	Ongoing	As required	
	<ul style="list-style-type: none"> Share the Schools Forum Forward Plan with relevant SELA officers to ensure it is included as an agenda item at the Headteacher breakfast briefings and specific school sector meetings Request inclusion of all Schools Forum meetings on the council events calendar (email to Constitutional Services) Keep the schools forum website up to date, for example by posting latest minutes and papers Draw schools' attention to the fact that all its agendas minutes and papers are publicly available (including the publication of formula consultation documents) Email to all schools, early years providers and other stakeholders after each schools forum meeting informing them of the discussions and decisions with a link to the full papers and minutes for further information 	Head of Governor Services	Ongoing	As required	
Decision Making	<p>Schools Forum</p> <ul style="list-style-type: none"> Organise, operate and record any voting activity of the schools forum in line with the provisions of its local constitution clear recording of votes where there are contrary views 	Schools Forum Clerk	Ongoing	As required	Every meeting
	<p>Funding Formula (as per Appendix 6)</p> <ul style="list-style-type: none"> Submit request for inclusion of decision on Resources Department Preliminary Forward Plan 	Senior Finance Manager, Education	July	Annually	N/A

	Task	Responsible Officer	When	How Often	Meeting Date
	<ul style="list-style-type: none"> Draft decision paper (see below) to CSLT for clearance by DCS Draft decision paper to Strategic Director of Resources for first sight Obtain legal concurrent 		Late December to early January		
	<ul style="list-style-type: none"> Submit final decision paper to Strategic Director of Resources for decision (must be sent from AD, CAS Finance) Forward signed decision to Divisional Business Manager, Professional Finance Services 		Immediately after January Schools Forum meeting		
Training / Professional Development	<ul style="list-style-type: none"> Monitor, on a regular basis, the schools forum and general schools funding pages on the GOV.UK website Arrange for the distribution of any relevant DfE information to schools forum members 	Schools Forum Clerk	Ongoing	As required	
	<ul style="list-style-type: none"> Develop, maintain and deliver the annual Schools Forum Induction training package, in consultation and conjunction with Senior Finance Manager, Education 	Head of Governor Services		As required and at least annually	October
	<ul style="list-style-type: none"> Develop, maintain and deliver the annual Schools Forum Finance training package 	Senior Finance Manager, Education	Ongoing	As required and at least annually	November
Annual Review	<ul style="list-style-type: none"> Schedule an annual review of the clerking specification with Director, Children's Services and Head of Governor Services, including arrangements and budget available to the Schools Forum for the servicing of the Forum in sufficient time to secure any additional resource requirements from the Central Schools Services Block. 	Senior Finance Manager, Education	October	Annually	December

Terms of Office

School members		Date confirmed	Term ceases
Maintained Nursery school			
Helen Rowe	Dulwich Wood Nursery School	05/10/2023	31/07/2026
Maintained Primary school			
Susannah Bellingham	Brunswick Park Primary School (Comm HT)	03/10/2019	31/07/2025
Kate Wooder	Bridges Federation (Comm HT)	16/01/2025	31/12/2027
Janice Babb	St James the Great & St John's Catholic Primary Schools (Federation) (VA - RC)	03/10/2019	31/07/2025
Jane O'Brien	Chair of Governors, Heber Primary School (Comm Gov)	05/10/2023	31/07/2026
Megan Pacey	Chair of Governors, Dulwich Village Church of England Infants' School (VA - CoE)	01/09/2024	31/07/2027
Maintained Secondary school			
Catherine May	St Saviour's & St Olave's School	15/06/2023	31/07/2026
Maintained Special school			
Heidi Tully	Tuke School	22/09/2022	31/07/2025
Pupil Referral Unit			
Michael Jarrett	SILS	16/01/2025	31/12/2027
Academy Primary school			
Haley Foxworthy	Nexus Education Trust (Senior Education Lead)	19/09/2024	31/07/2027
Vacant			

Academy Secondary school			
Steve Morrison	Kingsdale Foundation School	03/10/2019	31/07/2025
James Wilson	Bacon's College	19/09/2024	31/07/2027
Matt Jones	Chair, Ark Globe Academy	12/12/2024	30/11/2027
Jessica West	Ark Walworth Academy	16/01/2025	31/12/2027
Felicity Corcoran	St Michael's Catholic College	16/01/2025	31/12/2027
Alison Harbottle	The Charter School East Dulwich	16/01/2025	31/12/2027

Academy Special school			
Steph Lea	Spa Education Trust	19/09/2024	31/07/2027
Non-school members			
Nicola Howard	Early year providers (PVI): 1st Place Children's and Parents Centre	03/10/2019	31/07/2025
Pia Longman	Southwark Diocesan Board of Education – Co-Chair	14/12/2023	31/07/2026
Vacant	Archdiocese of Southwark Schools'		
Jane Button	16 to 19 year providers (Principal, Southwark College)	19/09/2024	31/07/2027
Betty Joseph	Teachers Professional Associations	03/10/2019	31/07/2025

1. Induction: Schools Forum Regulatory Framework, covering:

- An introduction to schools forum and its crucial role in allocating resources to reflect collective priorities
- The regulatory framework:
 - [Education Act 2002](#); [The Schools Forums \(England\) Regulations 2012](#) & [Local Government Act 2000](#)
 - Operational guides
 - School finance regulations
 - Schemes for financing schools
- The role of schools forum in outline form and procedural requirements ([Schools forum operational and good practice guide](#));

The purpose of the session is to ensure members have a clear picture of the legislation and regulations that govern the role of Schools Forum and the council's role in decision-making

2. Induction: Role and Powers of Schools Forum, covering:

- [Schools Forum powers and responsibilities](#)
- The [Southwark Schools Forum Constitution and Terms of Reference](#) and subgroups' terms of reference – the regulations and the powers local authorities have in constituting their schools forums
- The role of schools forum members in representing their sector, and settings and school more generally, and how members might communicate with and gather the views of their peers

The purpose of the session is to describe the makeup and remit of the Schools Forum; the range of subgroups and their contribution to decision-making and the importance of acting as a sector representative when contributing to discussion and voting

3. Finance: Schools Block (Funding Formula), covering:

- The formula for distributing funding to mainstream schools
- The consultation on funding distribution and the proposed formula for the next financial year
- Comparative funding by phase and block compared with our statistical neighbours
- The proposals for de-delegation for mainstream maintained schools and general duties for maintained schools.

The focus of the session is on the schools funding formula for the current financial year and the changes proposed for the next financial year.

4. Finance: Central, Early Years and High Needs Blocks, covering:

- The central, early years and high needs blocks
- Comparative funding by phase and block compared with our statistical neighbours

This session will look in detail at the separate funding blocks

Schools Forum meeting schedule, with lead in times

Appendix 5

Schools Forum Date	Agree draft agenda / confirm forward plan	Draft reports for CSLT*	CSLT	Draft reports for Chairs	Chairs' Pre-meet	Publish SF papers	Schools Forum	Publish Decision log	Publish Draft minutes
02-Oct-25	26-Jun-25	10-Sep-25	17-Sep-25	19-Sep-25	22-Sep-25	25-Sep-25	02-Oct-25	07-Oct-25	16-Oct-25
11-Dec-25	02-Oct-25	19-Nov-25	26-Nov-25	28-Nov-25	02-Dec-25	04-Dec-25	11-Dec-25	16-Dec-25	29-Dec-25
15-Jan-26	11-Dec-25	<i>31-Dec-25</i>	07-Jan-26	<i>02-Jan-26</i>	08-Jan-26	08-Jan-26	15-Jan-26	20-Jan-26	29-Jan-26
<i>19-Mar-26</i>	15-Jan-26	25-Feb-26	04-Mar-26	06-Mar-26	10-Mar-26	12-Mar-26	19-Mar-26	24-Mar-26	02-Apr-26
25-Jun-26	19-Mar-26	03-Jun-26	10-Jun-26	12-Jun-26	16-Jun-26	18-Jun-26	25-Jun-26	30-Jun-26	09-Jul-26

Draft report dispatch date TBC

if required

Chair's involvement

5 working days

Friday following CSLT

5 working days

3 working days

10 working days

*Children's Services Leadership Team

Summary Guidance

Summarised guidance of report content and process is outlined below.

Full guidance and 2025-26 forward plan submission, reports and Equality Impact and Needs Analysis is located at <T:\Finance\01 - Budget Setting\2025-26\Dedicated Schools Grant\School Funding Formula Decision>

Report Content

1. The 2025-26 Delegated Chief Officer decision making report (*4. Delegated Chief Officer - Schools Funding Formula 2025-26 Final Signed 20.01.25*) can be used as a template, with the relevant Schools Forum paper and minutes updated and the finance and legal concurrent being refreshed closer to the time when the decision is to be taken.
2. In terms of order: the finance concurrent should be obtained prior to DCS clearance and legal concurrent after DCS clearance and the final report sent to the Strategic Director of Resources by the Assistant Director, Children's and Adults' Finance.
3. Please note, all reports to individual decision makers should include a proportionate community impact statement that considers any effects on the community at large and on people identified as possessing "protected characteristics", as outlined in the Equality Act 2010 and the approach, including socio-economic disadvantage and health inequality.
4. An equality impact and needs analysis was completed and cleared by the Head of Equality Diversity and Inclusion and the DCS (*5. Equality Impact and Needs Analysis - Schools Funding Formula 2025-26*) for the 2025-26 report and as there we no negative impact assessed – the same analysis should apply for future years unless there are significant changes to the current National Funding Formula factors and rates.
5. Finally, the 2025-26 report is be based on the April 2024 template (*Delegated-Chief-Officer-template-with-guidance-April-2024*) and confirmation that this version remains the latest template will be necessary prior to completion of the final report.

Process

Key Dates	Action	Responsible Officer / Body
By July	Submit request for inclusion of decision on Resources Department Preliminary Forward Plan to Divisional Business Manager, Professional Finance Services (Ashleigh Jones) (see Appendix 1 for draft submission)	Senior Finance Manager, Education
Mid to late July	Indicative Dedicated School Grant (DSG) allocations published	Department for Education (DfE)
August to mid-September	Schools Forum papers - draft approval at Children's Services Leadership Team (CSLT) and discussion with forum chairs	Senior Finance Manager, Education / CSLT / Schools Forum Chair(s)

Key Dates	Action	Responsible Officer / Body
Mid to late September	National Funding Formula (NFF) updates Schools Block allocation, including funding formula, proposals and launch of consultation	Schools Forum
September to November	Forum members consult with constituent members on LA funding formula proposals	Schools Forum members
Late November to early December	Schools Forum papers - draft approval at CSLT and discussion with Schools Forum Chair(s) Include the following wording in the Schools Forum report recommendations: That the Schools Forum recommends the funding formula proposals for formal decision of the LA	Senior Finance Manager, Education / CSLT / SF Chairs
Mid December	NFF updates Schools Block allocation consultation response Final funding formula agreed to be recommended to LA	Schools Forum
Mid to late December	Final DSG allocations published	DfE
Late December to early January	Draft decision paper (see below) to CSLT for clearance by DCS Draft decision paper to Strategic Director of Resources for first sight Obtain legal concurrent	Senior Finance Manager, Education / CSLT / DCS
Mid-January	Schools Funding Formula – agreement of APT	Schools Forum
Immediately after January Schools Forum meeting	Final decision paper to Strategic Director of Resources for decision (must be sent from AD, CAS Finance)	Assistant Director, Children's and Adults' Finance
	Decision taken (allow 5 days for call in, if possible, prior to submission of APT)	Strategic Director of Resources
	Forward signed decision to Divisional Business Manager, Professional Finance Services (who will notify the Overview and Scrutiny Committee chair and then pass to the constitutional team to process)	Senior Finance Manager, Education /
<i>c. 20 January</i>	Authority Proforma Tool submitted	Senior Finance Manager, Education
<i>Late January</i>	Decision published Decision - Schools' Funding Formula 2025-26 - Southwark Council	Divisional Business Manager / Principal Constitutional Officer