Westmorland & Furness Council

WESTMORLAND AND FURNESS SCHOOLS FORUM

23rd September 2026, Microsoft Teams Meeting, 9.30am

AGENDA

PART 1: ITEMS LIKELY TO BE CONSIDERED IN THE PRESENCE OF THE PRESS AND PUBLIC

Item	Item name	Papers	Responsible Member
1.	**Membership Update - Consideration of Forum Member vacancies**	Attachment 1	Clerk
2.	**Apologies for Absence**	Verbal	Clerk
3.	**Exclusion of Press and Public** To consider whether the press and public should be excluded from the meeting during consideration of any item on the agenda.	Verbal	All
4.	**Declarations of Interest**	Verbal	All
5.	**Minutes of Previous Meeting (10th June 2026) and Matters Arising (Action Log)**	Attachments 2 & 3	Chair/Clerk
6.	**Minutes from the HNB Working Group (16th June 2026)**	Attachment 4	Dan Hinton
7.	**DSG Outturn 2025/26**	Attachment 5	Amanda Chew
8.	**Maintained School Balances 2025/26 and 2026/27**	Attachment 6	Amanda Chew
9.	**School Funding Formula 2027/28**	Attachment 7	Amanda Chew
10.	**School Funding Formula 2027/28 Appendix 1 VSSS Modelling**	Attachment 8	Amanda Chew
11.	**Dates of Future Meetings** i. The next meeting of the Schools Forum will be held on 4th November 2026. The meeting will begin at 9.30am and will be via Microsoft Teams.	Verbal	Chair/Clerk

PART 2: ITEMS LIKELY TO BE CONSIDERED IN THE ABSENCE OF THE PRESS AND PUBLIC

Membership of Westmorland & Furness Schools Forum

Membership category - Schools and Academies	Number of positions	Members
Maintained Primary Schools	5	1. David Spruce, Appleby Primary School 2. Vacancy 3. Ian Nicol, Leven Valley Primary 4. Vacancy 5. Michelle Hughes, Dalton St Mary's CofE Primary School
Maintained Secondary Schools	2	1. Stephen Gilby, UCC 2. Mathew Hardwick, UVHS/Emma Aubrey, Dowdales School
Academy		
- Primary	1	1. Huw Davies, Ghyllside School
- Secondary	4	1. Jon Hayes, Queen Katherine School 2. Simon Laheney, Furness Academy 3. Mark Harris, Kirkbie Kendal School 4. Nicola Carruthers, Queen Elizabeth School
- Special	1	1. Vacancy
Maintained Nursery	1	1. Alyssa Dobbs, Kendal Nursery (proposed)
Special Schools	1	1. Dan Hinton, Sandgate School
PRUs	1	1. Lisa Balderstone, Newbridge House
Total	**16**	
Membership category - Non-School Members	**Number of Members**	**Expression of Interest**
CE Diocese	1	1. Charlotte Tudway / Laura Watson
RC Diocese	1	1. Michael Merrick
16-19 Providers	2	1. Scott Cubitt, Furness College 2. Vacant
EY/PVIs	1	1. Peter Graveson, Sunny Brow Day Care
Teaching Associations	1	1. Kate Garside, NEU
Non-Teaching Associations	1	1. Diane Clorley, Unison (proposed)
Total	**7**	
Total Forum Members	**23**	

WESTMORLAND AND FURNESS SCHOOLS FORUM

10th June 2026, Microsoft Teams Meeting, 9.30am

MINUTES

Schools Forum Members in attendance: Stephen Gilby (Chair), Dan Hinton, Andy Brewerton, Kate Garside, Emma Aubrey, Simon Laheney, Matthew Hardwick, Ian Nichol

Local Authority Elected Members and Officers in attendance: Frances Crackles (Clerk) Katherine Dalgliesh, Isobel Booler, Cllr Janet Battye, Claire Diggle, Gemma Parkes, Lesley Nixon.

Guests:

Item	Item name
1.	**Membership Update - Consideration of Forum Member vacancies** There are now 2 vacancies for members from a Maintained Primary. There is a vacancy for a member from a Maintained Nursery. The vacancy for a member from a Maintained Special School can only be filled by George Hastwell School. **ACTION:** Chair to follow up with George Hastwell School to ask for representative (Stephen Gilby) Simon Laheney also mentioned his position as CEO and not Headteacher, needs updating to reflect his position. **ACTION**: (Stephen Gilby) to double check the terms of reference Discussions are ongoing with Diane Clorley from Unison to represent the non-teaching association. Due to the retirement of David Nattress, there is also a vacancy for Schools Forum Vice Chair. Anyone who is interested in taking on this role should email the Chair and Clerk to discuss the role and succession planning.
2.	**Apologies for Absence** Laura Watson, Jon Hayes, Michelle Hughes, Lisa Balderston, Amanda Chew, Huw Davies

Item	Item name
3.	**Exclusion of Press and Public** There were no items on the agenda which the press and public should be excluded from.
4.	**Declarations of Interest** There were no declarations of interest.
5.	**Minutes of Previous Meeting (21st January 2026) and Matters Arising (Action Log)** The minutes of the last meeting were approved
6.	**Minutes of the last HNB Working Group (6th March 2026)** Dan Hinton gave verbal update, summary of minutes. Financial oversight from CD of the deficit forecast in region of 38 mil.
7.	**High Needs Budget Monitoring Q3 2025/26** (verbal update on outturn) Q3 monitoring forecast £14.143 million on HNB increase of £13.7 million in year. Main areas of expenditure are EHCP top ups, variances in ISP and post 16. Nothing that we're not aware of, that has not been spoken about previously. Main pressure increases in EHCP numbers. Since March 2025 there has been a large increase. Most EHCPs are in mainstream settings. Still high costs arising from pupil places in ISPs. Benchmarking high percentage of EHCPs against statistical neighbors. Real difference in locality, especially Barrow. Research piece to unpick (IB). Update on outturn – once been to cabinet. Reduction of £715,000 against the forecast, which is positive. Due to hard work in reduction in use of ISPs. Need to note positive steps in the right direction. Net deficit of £33million, deficit of just over 3 million if we get the plan approved and 90% will be written off. WAF high proportion of EHCPS in mainstream. Pushing careers and supported internships, to stop EHCPs earlier than 25, push from Sandgate. Important conversations about school curriculums with children with EHCPs. Not all about university progression, post 18/19. Slowing of deficit increase work from special schools in post 16-19 as not all going to Beaumont college, improving outcomes and independence by supported internships and apprenticeships. DH talked about the fractured education system, need to come together to move forward. Not just reporting % of 9's and A* what about EHCP children that have gone onto positive pathways. Should be the best possible education for every child. Concerned about general achievement of all, need to press for the system to change to recognize all round achievements. Develop collaboration in our systems. JB thanked everyone. How will Ofsted make use of the achievement category, currently driven by attainment and national performance. Not ignoring it but a wider reflection and recognition of all students in a balanced way.

Item	Item name
8.	**De-Delegated Budgets Monitoring Q3 2025/26** CD Q3 update – underspend £100k. Agreed by School Forum in January. Underspend covers contingency. Expenditure on the closure of North Walney, all other areas expected to be in budget. No verbal update for outturn but not wildly different from Q3. Need to maintain healthy budget in here moving forwards, but hard to predict.
9.	**Maintained School Balances 2025/26** Verbal update – CD report come to School Forum after cabinet. Less positive picture. Net balance of 2.136m at end of March 25, close of March 26 deficit of £4.76 m. If the next year is similar we would be looking at a deficit of 7 million. Schools in deficit from 36 to 46. PRU and special schools all in deficit and 40% of primaries. Increasing deficits issue for schools and LA. Lots of stress to heads. Could impact on reserves. Trajectory could affect financial viability of council. SF members be aware, in person meetings with all deficit schools. LA trying to support schools. Provided training around budget planning etc and monthly finance newsletter. Setting up review meetings with certain schools. Budgets just come in for next 3 years but CD not in position to share yet, currently just amalgamating. JB cabinet working closely with corporate management preparing next year's budget. Having to plan for council reductions of 30 mil next year and likely to be more. Very tight funding. Be prepared for the reality, need to keep the LA financially viable. AB – never been involved in so many restructures and redundancies in 15 years. Do not have an up to date restructure and redundancy policy. Using the Cumbria 2018 policy which is an issue. As a union they have put together guidance for headteachers. Got to be at least a year in advance to make changes before you can even go to redundancy. DH not just a maintained problem also an academy problem, need to think of this across the board. School system benchmarks 70 million higher than elsewhere as we have small school units. School deficits, 1.4 million of the negative was 3 schools, 1 million was 2 schools. A few schools that are impacting the system with a greater extent than you would expect. Need to be leadership decisions in schools to move through this. IB drawn up a proposal for a multi disciplinary taskforce, HR, finance and school improvement, additional resource to work with the schools with the highest deficits. Liability is 9 million dependent on no schools with surpluses converting to an academy. Could consider using contingency to support. Does the LA need to create traded offer around school's finance? Proposal almost done as pilot to see the impact this makes. Workforce development around finance and ascertain that the quality is there. We can withdraw financial delegation but to do that we would need more capacity than we

Item	Item name
	currently have. Vast majority of schools take the challenge and culture shift, 15 restructures supported by unions. Got to be accepting and take responsibility to do more. Thank you to colleagues for all the work behind the scenes and support of SF and good relationships with colleagues to maintain progress we are making. Every decision is currently based around we have a deficit and not how we want to lead our schools and education for the children. Lack of academisation is because of the choices taken away because of the deficits. Got to work together to get the deficits going in the right way. S151 officers see that there will be need of reserves for HNB. Single biggest risk to the council.
8.	**SEND Reform Plan Briefing** IB submission update –Starting from a positive place. High number of EHCPS in mainstream already. SEN support PA 6.5% below national, exclusion rate is half the rate of national. Developing a reform plan in a strength-based way. Structural deficits in the system around therapeutic support and special schools. Tried to capture that our reform plan meets our needs. 19th June deadline for final plan. If successful money will come in September. So far feedback has been positive. To do demand and forecasting template, had to ask asset team to go out to schools to view what can be done from a capital point of view to what activity needs to be done. GP looking at how to meet need earlier as legislation is to change. Work asked to be done around clear relationships and the therapeutic aspect of experts at hand and how this will impact on financial sustainability and sufficiency plan on financial sustainability. Mainly tweaks more than anything else. Positive messages from advisors. Engagement with school system has been so well received, humbling amount of time that colleagues have given. Also, NHS providers been working with us. Finance CD and AC have done a huge amount of work on baseline positions and our advisors confident in. Modeling mitigations – no savings from experts at hand over next 2 financial years as will take time to embed. Increase in EHCP requests especially for WAF. Over 50% coming from parents. Overarching feedback from the advisers is that the plan is nearly there. GP – A lot of transformation going on. Recap from DFE. Waiting to see what’s happening with the funding. Waiting for national inclusion standards, which we’re hoping will align with our OAP and mirror this. Currently in year 1 of the reform plan but continuing with current system where underlying legislation hasn’t changed. Mainstream inclusion iterated constantly. They are expecting that mainstream will be default setting even though we are already there. How do we support settings. Expectations to access help earlier, as currently the only way is an EHCP to get more funding. Upskilling the workforce and systemic change rather than current EHCP model which is ringfenced for individual children.

Item	Item name
	Still awaiting info on national inclusion standards, inclusion bases and accountability. Told we will be getting updated code of practice which will change current areas of need and individual support plan framework. Experts at hand, key aspect of national reform. Access to earlier advice for their cohorts from professionals. Aspirational aim nationally that's coming from the Dfe. Presents significant challenges such as recruitment eg EPs, national shortage of therapists, SALTS and OTs. Recruitment drives and plan to increase support workers. Moving away from individual support, designed to support settings. Schools will have link advisor. AB biggest concern, staff workload will increase because of this and the amount that are looking to leave the profession. This needs to be built into model as mitigation and fund this and how. LA collectively raised this with DfE particularly around SENCOs. How do we change the perspective of parents. Spike in year 5 & 6 requests. Need to work on transitions. Or yr 9/10 persistent absence EBSA then what will they do post 16. Lot of engagement with parents, local offer drop ins and parent carer forum. Need to help our parents understand and access support earlier.
9.	**Dates of Future Meetings** i. The next meeting of the Schools Forum will be held on 23rd September 2026. The meeting will begin at 9.30am and will be via Microsoft Teams.

Schools Forum – Action Log 2026/27

Meeting date	Agenda item	Ongoing Actions	Owner	Due date	Update for next meeting
10/06/26	1	Chair to double check the ToR around academy membership status. SL CEO not Headteacher	Stephen Gilby	September 2026	
21/1/26	7	Develop a short guide on what to do if HSE gives notice of a visit to provide immediate assurance for school leaders	Isobel Booler & Allan Harty	September 2026 ~~June 2026~~	In progress
21/1/26	1	Chair to contact George Hastwell School to ask for representative from maintained special school	Stephen Gilby	September 2026 ~~June 2026~~	
17/9/25 ~~11/06/25~~	1	Chair/ Scott Cubit to follow up with new Principal at Kendal College ~~Carried forward from 2024/25: Chair to contact new Principal at Kendal College re membership of Schools Forum~~	Stephen Gilby & Scott Cubitt	Nov 2025 ~~Sept 2025~~	In progress

(See GREY for completed items)

Meeting date	Agenda item	Completed Action	Owner	Due date	Update for next meeting
21/1/26	1	Raise Forum member vacancies in maintained primary schools with PHA Exec	Huw Davies	~~June 2026~~	Completed
21/1/26	1	Contact managers at Brantwood and Hindpool, copying the Chair of Schools Forum to ask for a Forum representative from maintained nurseries	Marie Barnes	~~June 2026~~	Completed

Meeting date	Agenda item	Completed Action	Owner	Due date	Update for next meeting
21/1/26	7	Arrange invitation to CASH re School Landlord	Stephen Gilby	~~June 2026~~	Completed
21/1/26	7	Arrange invitation to PHA re School Landlord in summer 2026	Huw Davies	~~June 2026~~	Completed
21/1/26	9	Share breakdown of deficit between primary and secondary schools	Amanda Chew	~~June 2026~~	Completed

WESTMORLAND AND FURNESS SCHOOLS FORUM
High Needs Block Working Group

16th June 2026, Microsoft Teams Meeting, 1.00-3.00pm

MINUTES

Attendees: Dan Hinton, Stephen Gilby, Claire Diggle, Amanda Chew, Cllr Janet Battye, Emma Aubrey, Leeann Bell, Isobel Booler, Gemma Parkes, Michelle Hughes, Lesley Nixon (part), Fran Crackles (Clerk)

No.	Item name	Lead
1.	**Apologies** Andy Brewerton	Chair
2.	**Notes and actions of last meeting** - Bandings more national consistency post reform but not had any specific detail yet, so cannot do anything at present. Need to relook at moderation with an independent eye over current bandings. (not high priority, will be large body of work and consultation) - Minutes agreed	Chair
3.	**High level summary of SEND Reform and the HNB Stability Grant** - IB shared last week before reform plan needs to be submitted. Done all last amends and waiting for official sign off from chief exec, 2 x ICBs and S151 officer. Aim to submit on Friday 19th am. Agreed the experts at hand and our approach to therapeutic commissioning. Pleased with progress around PCF and now have a steering group. GP work continuing to lead on steering groups helping parental voice. On track for submission. - Our change is strength based and intent on improving for all. - Improving outcomes for children - Increase confidence of parents, carers and young people	Isobel Booler/Gemma Parkes

No.	Item name	Lead
	- Feedback of plan after first submission was positive and we have made all amends suggested. - Outcome will be communicated in September. - The plan is 3 different documents. Detailed work so every document is triangulated. - Do we need to look at makeup of steering groups? Schools quiet and parents dominant. May need a separate space for parents. Potential for different group with a parent representative. - Parent voice can be about specific things and CYP rather than the wider picture. Agreed good idea to have a separate group.	
4.	**Financial baseline position** - Aligned to the maturity matrix. - DfE advisor happy with the work done. - Mitigations been modelled into the plan - Only initially required to show forecasting to 27/28 for the plan. - HNB deficit forecast quite significant. - AC modelled the mitigations in the plan. - Most savings driven by increased RP and mainstream places, reducing reliance on ISP. - If we have continuing increase of EHCPs as is which is roughly 10%, put in the plan to 3.66%. Expected savings in later years of £2million before March 2030. - DfE advisor indicated a reduction of deficit growth as part of the plan - Hard to show significant change without a change in legislation. - Council bigger picture, need to make service reduction and savings. - Positive impact on our figures that 73% of our EHCPs are already in a mainstream setting. - Need to be confident in what our change story is.	Claire Diggle/Amanda Chew
5.	**Reform plan and mitigations. Including Experts at Hand delivery model and sufficiency** **Sufficiency** - Strengthening inclusive practice and targeting capital investment to support sustainable continuum of local provision. - Unique context addresses the inequities in provision of special school and AP provision.	Isobel Booler/Gemma Parkes

No.	Item name	Lead
	- Situation exacerbated by LGR, lack of provision in Eden. - Three distinct funding streams relating to high needs. - Our approach will maximise the potential of working with Trusts, Diocese and community settings to develop collaborative projects. - Development of RP strengthened relationships e.g. collaboration with CET regarding RP at Stramongate School. - Inclusion at the core, fewer children needing to travel and impact on transport funding. **Experts at Hand** - Proposed delivery model as part of reform plan, subject to review and change. Year 1 will be confirming and shaping the model. - Work to be done on Universal so easier for schools to access. - Concern around scarcity of therapists and resources. - Expanding special school outreach. - Part of year 1 establishing mechanism that support is easily accessible and can meet need earlier. Sustainable model. - Funding increases over the next 3 years, so full package will not be ready to go in September. LAs and ICBs will have to develop provision for recruitment. - In September what can schools access, but it won't be the full model. DfE wants to see interim arrangements whilst we build the full offer. Eg do not know how many therapists we will need until a strategic review has taken place. - Whole process is complex and will take careful planning and involvement from outreach schools and support. -	
6.	**Discussion around this working group. Moving forwards the need will be a monitoring group for the plan to evaluate delivery and impact.** - Rich discussions and a space where we can have a deep dive to hold ourselves accountable for delivery and sense check. - To keep the cumulative deficit low is going to take all of us to deliver what we have said.	All

No.	Item name	Lead
	- Our finance advisor did say we had a reduction in growth of rate of deficit. - If we don't have this group to monitor and sense check, we could lose control. To hold us to account and that if there is anything we have missed to come to solution. - Consensus helpful to continue with this group. - Do we need anyone else in this group? Do we need more post 16 representation potentially? - Post 16 & 19 offer at Kendal College makes most sense – one of our biggest spends. Action DH to reach out to Kendal College and coordinate with SG so they can be at SF and in this group.	

Next meeting – Before full schools forum if possible. Early September. FC to organise.

WESTMORLAND & FURNESS COUNCIL SCHOOLS FORUM
Report Title: Dedicated Schools Grant Outturn 2025/26
Meeting date: 23 September 2026
Report of: Isobel Booler, Assistant Director Education & Inclusion

1.0 Executive Summary

1.1 This report presents the Dedicated Schools Grant (DSG) earmarked reserves position for financial year 2025/26. The overall DSG earmarked reserves stand at a net deficit of £33.034m, of which £39.428m relates to a deficit against the High Needs Block offset by a surplus against the Other DSG blocks of (£6.394m). The overall DSG net deficit increased by £10.899m in 2025/26.

2.0 Link to Council Plan Priorities

2.1 The value of the reserves is supportive of the Council Plan priorities that “People in Westmorland and Furness are healthy, happy, active and able to lead fulfilling independent lives, thriving in their communities” and the commitment to reduce inequality and “ensure that young people have enough opportunities to access the best education”.

3.0 Recommendation

3.1 The Schools Forum are recommended to note the 2025/26 outturn position.

4.0 Rationale and Evidence for the Recommendation

4.1 Each year, in accordance with the conditions of the DSG, any under or overspend relating to the centrally retained element of the DSG must be transferred to the DSG earmarked reserve to be carried forward for future years.

4.2 As at 31 March 2025 the DSG earmarked reserves position was a deficit of £22.136m. The DSG had an overall in-year pressure of £10.899m as at 31 March 2026, comprising of a £13.008m pressure on High Needs offset by an underspend of (£2.109m) on Other DSG blocks. The overall cumulative deficit is therefore £33.034m split as a deficit balance on High Needs Block of £39.428m offset by a surplus balance on Central DSG of (£6.394m).

4.3 The outturn represents a decrease in pressure of (£1.741m) compared to the Q3 forecast due to a reduced pressure on the High Needs Block of (£0.715m) and (£1.026m) on other DSG blocks.

4.4 The table below shows the position on Other DSG Blocks and High Needs Block:

Position	Other DSG Blocks	High Needs Block	Total
DSG Balance as at 31 March 2025	(£4.285m)	£26.420m	£22.136m
Actual over/ (under) spends on DSG in 2025-26	£2.109m	£13.008m	£10.899m
DSG Balance as at 31 March 2026	(£6.394m)	£39.428m	£33.034m
Q3 Forecast DSG Balance as at March 2026	(£5.368m)	£40.143m	£34.776m
Movement	(£1.026m)	(£0.715m)	(£1.741m)

<u>Other DSG Blocks</u>

4.5 Other DSG Blocks reserve has increased by £2.109m.

4.6 The key variances were:

- Nursery Grants (£1.943m). This represents movement of (£1.089m) compared to Q3 relating to the difference between the actual take-up of Under 2s, 2, 3 and 4 year old free-entitlement nursery provision compared to the provisional Early Year Block funding allocation for 2025/26. The Early Years Block allocation was based on the previous year's actual take-up of provision for 3-4 year olds and estimated take-up provision for Under 2s and 2 year olds following the expansion of new free entitlement provision to working parents of Under 2s and 2 year olds during financial year 2025/26. An adjustment will be made in July 2026 against the 2025/26 DSG allocation to update the Early Years block allocation to reflect actual take-up of provision. The underspend is also partly explained by the number of funded term days in 2025/26 financial year. DSG funding is allocated to local authorities based on 190 term days however providers are funded on the actual number terms days in the financial year which was 184 days in 2025/26.

- De-delegated budgets (£0.069m) (see para 4.8 – 4.9 below).

- Growth Fund (£0.016m). There was only one commitment of £0.055m relating to Kirkby Stephen Grammar School against a growth fund budget of £0.071m.

- The remaining balance related to individually non-material variances totalling a net underspend of (£0.081m).

4.7 The Other DSG Blocks outturn above includes those budgets that are de-delegated from maintained schools to support centrally provided services. The below table summarises the de-delegated budgets outturn position:

Budget Line	2025/26 Budget £m	2025/26 Outturn £m	Variance £m	Previous Quarter Variance £m	Change in Variance £m
Contingencies	0.286	0.180	(0.106)	(0.125)	0.020
Insurance	0.377	0.377	0.000	0.000	0.000
Staff Costs	0.430	0.467	0.037	0.023	0.013
Library and Museum Services	0.197	0.197	0.000	0.000	0.000
School Improvement	0.245	0.245	0.000	0.000	0.000
Total De-Delegated Budgets	1.535	1.466	(0.069)	(0.102)	0.033

4.8 The de-delegated Contingency Fund expenditure of £0.180m mainly related the North Walney site closure and Channelside pre-opening costs totalling £0.071m and schools in financial difficulty funding comprising split site funding for Cartmel Primary of £0.054m, Hawkshead Primary £0.019m for redundancy costs and support for Calthwaite Primary £0.008m. The contingency fund position is summarised in the below table:

De-delegated Contingency Fund Budget	2025/26 Outturn £m
Budget 2025/26	0.286
Ill health retirements	0.000
Settlement Agreements and Staff Termination costs	0.000
Administration costs Teachers Annual Pension Return	0.029
Other miscellaneous costs	0.000
Total Unforeseen Circumstances	0.028
Schools in Financial Difficulty	0.081
Additional Costs relating to New, Closing or Amalgamated Schools	0.071
Total Net Expenditure 2025/26	0.180
Forecast Underspend 2025/26	(0.106)

4.9 The de-delegated staff costs pressure of £0.037m related to maternity absence cover £0.039m offset by an underspend of (£0.002m) against trade union facilities time).

High Needs Block

4.10 The deficit on the High Needs Block has increased by £13.008m, a decrease of (£0.715m) compared to Q3:

Description	Budget £m	Outturn £m	Variance £m	Previous Qtr Variance £m	Change in Variance £m
High Needs - Top Ups	8.622	12.843	4.220	4.244	(0.024)
Independent Special Placements - Post-16	1.034	3.738	2.704	3.199	(0.495)
Independent Special Placements - Day	3.707	6.489	2.782	2.911	(0.129)
Post-16 Further Education	0.707	2.017	1.310	1.439	(0.129)
Education Otherwise Placements	0.554	1.586	1.032	0.965	0.067
Special Schools	8.964	9.687	0.723	0.587	0.136
High Needs - Invest to Save	0.000	0.280	0.280	0.282	(0.002)
Central SEN (Equipment, 6th Day Provision)	0.032	0.133	0.101	0.129	(0.028)
Resourced Provision Places	0.653	0.695	0.042	0.042	0.000
Pupil Referral Unit	2.128	2.128	0.000	0.000	0.000
Mobility and Independence Contract	0.018	0.018	0.000	0.000	0.000
Share of de-delegated (special schools)	0.032	0.032	0.000	0.000	0.000
Independent Special Placements - Residential	1.341	1.199	(0.142)	(0.041)	(0.101)
Inclusion Teams	1.237	1.192	(0.045)	(0.034)	(0.011)
Total DSG to transfer to DSG HNB reserve	29.029	42.037	13.008	13.723	(0.715)

4.11 The key variances were:

- EHCP top-ups for pupils in mainstream schools and Early Years Providers £4.220m. The average top-up paid to a Westmorland & Furness mainstream school was £8,229 per EHCP student, an increase of £27 compared to Q3 and a reduction of £285 compared to 31 March 2025. The average top-up for resourced provision units was £9,565 a reduction of £16 compared to 31 March 2025. This budget line also includes EHCP top-ups for students placed in Cumberland schools of £0.522m and students placed in other local authorities of £0.226m.

- ISPs Post-16 £2.704m. The overall number of Post-16 ISPs as at 31 March 2026 was 70. Fourteen placements ended 31 August 2025, however, due to the lag in reporting these were not known to have ended when the Q3 report was prepared and this is the main reason for the reduction in expenditure of (£0.495m) compared to the Q3 forecast. The average cost of placements that ended in August was £40,048 however the average cost of new placements starting from September onwards was £51,512 as at 31 March 2026.

- ISPs Day £2.782m. The outturn represents a decrease of (£0.129m) compared to Q3. There were 117 pupils in day placements as at 31 March 2026, an increase of 6 compared to Q3 and an increase of 13 compared to 31 March 2025. The average cost of placements that ended in August was £49,579 however the average cost of new placements from September onwards was £63,157 as at 31 March 2026.

- ISPs Residential (£0.142m). This represents a decrease of (£0.101m) compared to the Q3 forecast. The overall number of placements as at 31 March 2026 was 17, a reduction of 1 compared to Q3.

The below table summarises the number of pupils in ISPs by provider type:

Number of Children & Young People (CYP) with EHCPs in Independent Special Placements 2025/26

Placement Type	2024/25 Outturn	2025/26 Q1	2025/26 Q2	2025/26 Q3	New	Ended	Placement Changes: In	Placement Changes: Out	Total Change	2025/26 Outturn	2025/26 Outturn £m	2024/25 Outturn £m	Average Annual Cost of Placements 2025/26 £	Average Annual Cost of Placements 2024/25 £
ISP - Day	104	103	105	111	7	-1			6	117	6.489	6.109	64,171	61,419
ISP - Residential	16	16	14	18	0	-1	0	0	-1	17	1.199	1.327	79,558	78,302
ISP - FE Colleges	60	68	75	84	0	-14	0		-14	70	3.738	2.445	55,999	45,368
Total	180	187	194	213	7	-16	0	0	-9	204	11.427	9.881		

- Post-16 Further Education £1.310m. The outturn represents a decrease of (£0.129m) compared to Q3 forecast. The expenditure reflects top-up payments to FE Colleges totalling £1.109m and other FE education providers of £0.908m. The outturn includes costs for 48 internships in both further education colleges and private providers.

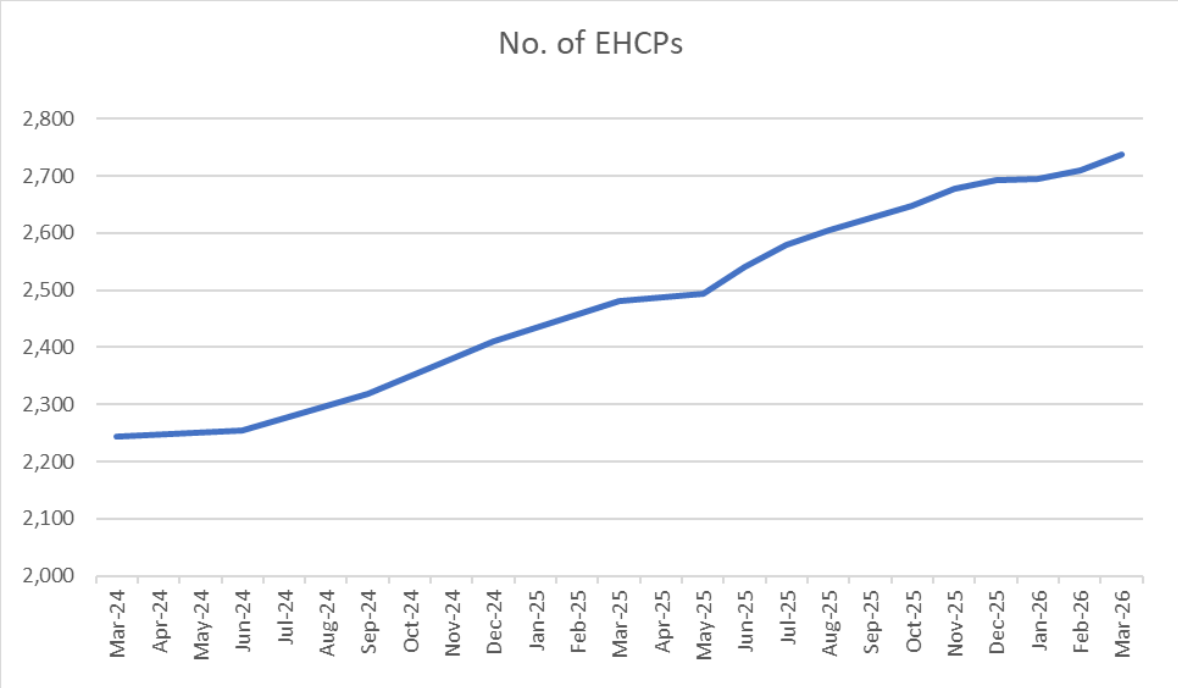
- Education Otherwise £1.032m. The outturn represents an increase of £0.067m compared to Q3 forecast and reflects costs associated with children being educated other than at a school (EOTAS) totalling £1.586m. The number of EOTAS children as at 31 March 2026 was 71. The outturn also includes backdated alternative provision costs associated with 22 children of £0.109m.

- Special Schools £0.723m. The outturn represents an increase of £0.136m compared to Q3 forecast and includes £0.108m relating to backdated amendments to EHCP top-ups. The average EHCP top-up per student paid to a Westmorland & Furness maintained or academy special school was £15,544 an increase of £101 compared to Q3 and an increase of £1,077 compared to 2024/25.

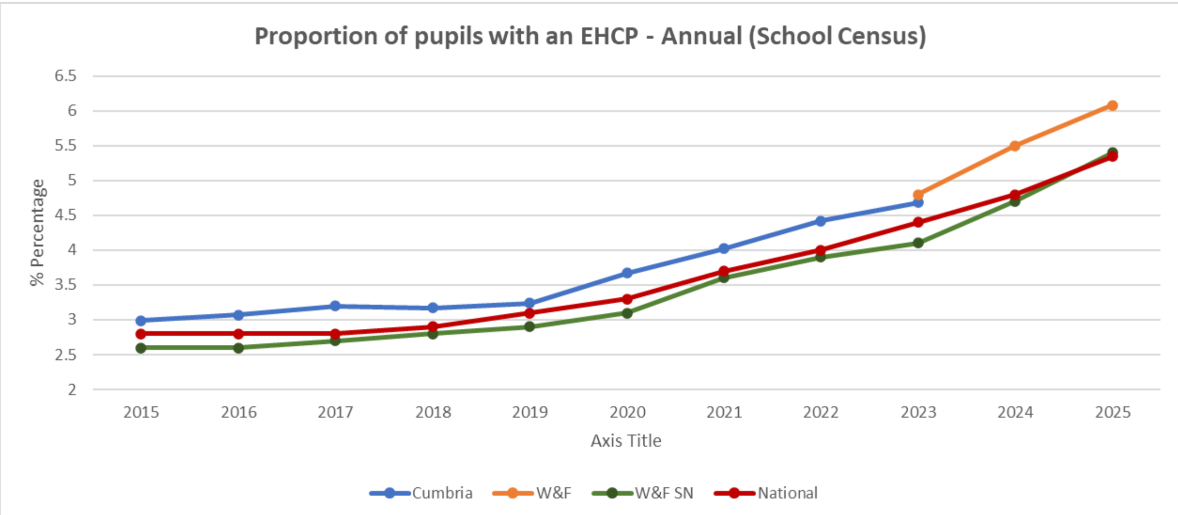
- High Needs Invest to Save Initiatives £0.280m. The expenditure here relates to the Sandgate School Early Intervention and Greengate Junior School Alternative Provision programmes.

- The remaining balance relates to individually non-material variances totalling a net pressure of £0.099m.

4.12 The pressure against the High Needs Block continues to be due to specific budget pressures relating to the growth in demand for EHCPs for children and young people with SEN. The number of CYP with an EHCP as at 31 March 2026 was 2,737. The number of ECHPs has increased by 256 since March 2025 and 45 since Q3:



4.13 The benchmarking chart below shows that Westmorland & Furness' percentage of pupils with EHCPs is higher compared to the national and its statistical neighbours rates although the rate of increase for Westmorland & Furness is matched by the rate of increase against its statistical neighbours:



4.14 Figures in the above table are as at the January census date for each year.

4.15 In 2025/26 local authorities had an increase in their High Needs Block funding of at least 7% per head of population compared to their 2024/25 baseline resulting in total funding of £28.923m in 2025/26 after deductions for directed funding of high needs places by the DfE, an increase of £1.985m compared to 2024/25. However, 26% of the total allocation was based on historic 2017/18 actual spend and Westmorland & Furness was the 13th lowest funded out of 151 local authorities receiving £807 per head of 2-18 year old of population in 2025/26. The National mean per head funding was £988 and if Westmorland & Furness had been funded at the mean level it would have received an extra £6.880m. The High Needs Block budget included a transfer from the Schools Block of 0.106m to support the budget pressures. The government announced in February 2026 that they will address long standing SEND financial pressures by covering up to 90% of local authorities' High Needs-related DSG deficits accrued up to the end of 2025/26 through the High Needs Stability Grant. This grant will be paid subject to each local authority securing the Secretary of State for Education's approval of their local area's Local SEND Reform Plan. The deadline for submitting the final plan is 19 June 2026.

5.0 Options

5.1 Schools Forum is recommended to note the 2025/26 outturn on the DSG earmarked reserves.

6.0 Financial and Other Relevant Implications

6.1 Resource and value for money implications are considered throughout this report. No equality/legal/implications have been identified.

9 September 2026

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WESTMORLAND & FURNESS COUNCIL SCHOOLS FORUM
Report Title: Maintained School Balances 2025/26 and 2026/27
Meeting date: 23 September 2026
Report of: Isobel Booler, Assistant Director – Education & Inclusion

1.0 Executive Summary

1.1 This report presents a summary of the maintained schools balances as at 31 March 2026 and projected balances for 31 March 2027. The school balances position as at 31 March 2026 was a net deficit of £4.760m and is predicted to be net deficit of £3.625m by 31 March 2027.

1.2 Despite the overall net deficit balance in 2025/26, 21 schools had an excess surplus balance greater than 10% (primary) and 6% (secondary) of school budget shares. Schools Forum maintained school representatives agreed in June 2025 that the excess claw back policy should not be applied to school balances in 2025/26 and are asked to support the recommendation that the excess surplus balances policy is **not** applied to school balances at the end of 2026/27.

1.3 As reported to the Council's Audit Committee, the financial sustainability of maintained school balances represents a significant risk to the wider education system and to the Council. Steps have been taken by LA officers to address this including strengthening the deficit school budgets policy, finance review meetings, financial training for school staff and strategic planning.

1.4 It is proposed that a multi-disciplinary Schools Deficit Task Force is created to work intensively with a small number of schools with the highest deficits. Schools Forum maintained school representatives are asked to support the funding of this from the de-delegated contingency fund at an estimated cost of £0.138m for 12 months.

2.0 Strategic Planning and Equality Implications

2.1 Managing the level of school balances is supportive of the Council Plan outcome that '"People in Westmorland & Furness are healthy, happy, active and able to lead fulfilling independent lives, thriving in their communities" and the commitment to reduce inequality and "ensure that young people have enough opportunities to access the best education".

3.0 Recommendation

3.1 The Schools Forum is asked to:

- note the balances for maintained schools as at 31 March 2025 and projected balances as at 31 March 2026;

- note the action the local authority is taking to manage the risk of deficit balances on the Council's financial sustainability;

  and

  Schools Forum maintained schools representatives are asked to:

- approve the recommendation that the excess surplus balances policy is **not** applied to school balances at the end of 2026/27

- support the funding of a Schools Deficit Task Force from the de-delegated contingency fund.

4.0 Maintained School Balances 2025/26

4.1 As at 31 March 2025 the net deficit balance for maintained schools was £2.136m a decrease of £2.586m compared to the position as at 31 March 2024.

4.2 As at 31 March 2026 there was a net deficit balance for maintained schools of £4.760m, a decrease in net balances of £2.624m since 31 March 2025. The outturn position was £0.822m worse than schools' own predictions in their October budget plan submissions. The table below shows a breakdown of these figures separately by surpluses and deficits:

Schools	2024/25 Number of Schools	2024/25 Total Value (£)	2025/26 Number of Schools	2025/26 Total Value (£)	Change in value (£)
Maintained Schools with Surpluses	65	(£4.412m)	57	(£4.403m)	£0.009m
Maintained Schools with Deficits	38	£6.548m	46	£9.163m	£2.615m
Total	103	£2.136m	103	£4.760m	£2.624m

4.3 The below table shows a breakdown of schools with deficit balances by sector:

Sector	Number of Schools in Sector	Number of Schools in Deficit	Proportion of Sector	2024/25 Net Deficit £m	% of Total Net Deficit
Nursery	2	1	50%	0.196	2.1%
Primary	92	37	40%	4.636	50.6%
Secondary	6	5	83%	3.472	37.9%
Special	2	2	100%	0.549	6.0%
PRU	1	1	100%	0.310	3.4%
Total	103	46	n/a	9.163	100%

4.4 Of the 46 schools in deficit, 19 were below 5% of their total school budget shares as shown below:

Sector	Number of Deficits less than 5%	Number of Deficits between 5% -10%	Number of Deficits between 11% -15%	Number of Deficits between 16% - 20%	Number of Deficits greater than 20%
Nursery	0	0	0	0	1
Primary	16	7	4	4	6
Secondary	2	0	0	0	3
Special	1	1	0	0	0
PRU	0	0	1	0	0
Total	19	8	5	4	10

4.5 As can be seen from the table below there was an in-year pressure of £2.801m in 2024/25 and £2.624m in 2025/26:

Budget Line	**2024/25 £**	**2025/26 £**	**Variance £**	**Variance %**
Delegated Funding	(120.299)	(126.986)	(6.687)	5.6%
School income	(12.140)	(12.589)	(0.449)	3.7%
Total Income	**(132.438)**	**(139.574)**	**(7.136)**	**5.4%**
Staffing incl agency	105.892	112.742	6.850	6.5%
Premises	9.155	8.637	-0.518	-5.7%
Supplies & Services	15.439	15.774	0.335	2.2%
Professional Services	3.662	3.736	0.074	2.0%
Other	1.091	1.309	0.217	19.9%
Total Expenditure	**135.240**	**142.198**	**6.959**	**5.1%**
In-Year Movement	**2.801**	**2.624**	**-0.177**	**-6.3%**

4.6 The main pressure on school budgets related to staff costs which increased by £6.850m (6.47%) compared to 2024/25 mainly due to the teachers' and non-teaching staff pay awards and the increase in employer national insurance contributions. Whilst the increase in staff costs cannot wholly be explained by these cost pressures, the new grants receivable in 2025/26 to support schools with these cost pressures (National Insurance Contribution Grant, School Budget Support Grant and Core School Budget Grant) only equated to £2.490m.

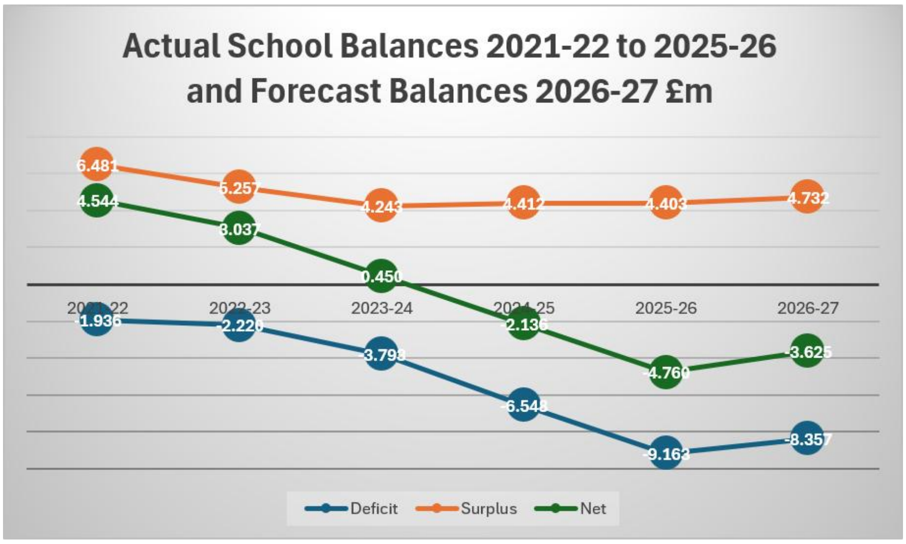
4.7 Despite the budget pressures 21 schools had an excess surplus balance greater than 10% (primary) and 6% (secondary) of school budget share in 2025/26. The total net balance over the thresholds was £0.824m. For comparison purposes there were 17 schools with a balance over the thresholds of £0.624m in 2024/25. As previously agreed by Schools Forum the claw back policy will not be applied to balances at the end of 2025/26 but to review the position annually. It is recommended that the clawback policy is not applied to balances at the end of 2026/27 as: the majority of these schools are forecasting falling balances in future years; the amount clawed back in previous years has been limited as schools are able to justify the excess balance and the administrative burden on schools submitting supporting evidence and LA officers reviewing evidence. LA finance officers will continue to monitor and review school balances that are deemed to be excessive and provide guidance to school governors and leaders, as appropriate.

5.0 Projected Maintained School Balances 2026/27

5.1 Based on school submitted May budget plans for 2026/27 the net school balances are projected to be a net deficit of £3.625m as at 31 March 2026 a forecast reduction of £1.136m compared to 2025/26 outturn. The table below shows a breakdown of these figures separately by surpluses and deficits:

Surplus/Deficits	2025/26 Number of Schools	2025/26 Total Value (£)	2026/27 Forecast Number of Schools	2026/27 Forecast Total Value (£)	Change in value (£)
Maintained Schools with Surpluses	57	(£4.403m)	75	(£4.732m)	(£0.329m)
Maintained Schools with Deficits	46	£9.163m	28	£8.357m	(£0.807m)
Total	103	£4.760m	103	£3.625m	(£1.136m)

5.2 The number of schools in deficit is forecast to reduce from 46 to 28 and the deficit balances are forecast to reduce by (£0.807m). Whilst the forecast indicates an improving position overall there has been a significant downward trend in school balances since 2021/22 as shown below:



5.3 If the trajectory on school balances doesn’t improve, alongside the High Needs deficit, this may ultimately affect the council’s financial viability. Additional risks include potential transfer of school deficits to the Council through closures/amalgamation or enforced sponsored academisations.

5.4 A School Balances Assurance report was presented to Audit Committee in June 2025 highlighting the growing financial risks facing maintained schools and the Council’s strengthened approach to managing them. The underlying risks are driven by falling pupil numbers, surplus places, a high proportion of small schools, SEND pressures, ageing estates and limited economies of scale.

5.5 Significant progress has been made in strengthening Westmorland and Furness’s approach to school assurance since Local Government Reorganisation. This has included strengthened governance, improved financial oversight and school sufficiency planning. The scale and complexity of the challenge means that longer-term structural interventions across the education system will likely be required over time.

5.6 The introduction of a revised schools with deficit balances policy has strengthened financial monitoring. Thirty-seven finance review meetings were held in Spring 2026 and many schools have taken significant steps to reduce costs. Some schools have taken advantage of the free financial health checks through the DfE’s School Resource Management Advisor (SRMA) programme. The findings and recommendations arising from these deployments have had mixed feedback but have mainly been received positively and have helped school leaders to identify the budget areas where improvements can be made. Strategic financial planning, budget settling and budget monitoring training has also been provided during the Spring 2026 term with good take up from headteachers, school business managers and governors.

5.7 However, progress is inconsistent between schools and some require deeper intervention beyond advisory support. There is a need for more intensive, hands-on support capacity across HR, School improvement and Finance.

5.8 Of the 28 schools proposing deficit budgets for 2026/27, 9 budgets have been approved on the basis of recovery plans. Eleven schools have not received budget approval on the basis of forecast rising deficits and/or recovery plans requiring further work.

5.9 It is proposed to establish a targeted, multi-disciplinary Task Force to provide intensive, time-limited intervention in priority schools to include HR Business Partner or workforce specialist, a senior school finance officer and school Improvement lead. There is an assumption that a SRMA will have been commissioned and have taken place. It is proposed to pilot this approach with 7 schools selected based on the highest deficits and lack of credible recovery plans.

5.10 The Task Force will require short term investment the cost of which is estimated at £0.138m for a 12 month pilot starting from September 2026. As the Task Force will be working directly with maintained schools in financial difficulty the Schools Forum maintained school's representatives are asked to support the funding of this from the de-delegated contingency fund. It is expected that the Task Force would be time limited working to reduce school deficits, improving in-year budget control, and mitigating future liabilities to the Council.

6.0 Options

6.1 The Schools Forum is asked to:

- note the report and the action the LA is taking to manage and support maintained schools with deficit budgets;

and the Schools Forum maintained representatives are asked to:

- support the proposal not to apply the excess surplus balances policy against school balances at the end of 2026/27.

- support the proposal to fund a Schools Deficit Task Force from the de-delegated contingency fund.

7.0 Financial and Other Relevant Implications

7.1 Resource and value for money implications are considered throughout this paper. If a maintained school with a deficit becomes a sponsored academy, the deficit remains with the LA. School deficits are not an allowable charge on the LA's schools budget. However, regulations allow, with the approval of Schools Forum, for closing school balances including those that close as a maintained school and become a new sponsored academy to be funded from a de-delegated contingency budget. This year to date there are no schools planning or expected to become an academy. No equality/legal/implications have been identified.

7 September 2026

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WESTMORLAND & FURNESS COUNCIL SCHOOLS FORUM
Report Title: School Funding Formula 2027/28
Meeting date: 23 September 2026
Report of: Isobel Booler, Assistant Director Education & Inclusion

1.0 Executive Summary

1.1 The DfE normally publish indicative school funding allocations for the forthcoming year in July, however publication has been delayed until Autumn 2026.

1.2 Each year local authorities are required to consult Schools Forum and its local schools on whether to adopt the NFF in full or apply a locally agreed funding formula.

1.3 Cabinet is the statutory decision maker on the school funding formula and its approval is required before submission of the Authority Proforma Tool (APT) to DfE (usually mid-January) which calculates the budget share for each maintained school and academy.

1.4 Due to the lead-in timescale for Cabinet papers and the time needed to consult schools and report to Schools Forum it is proposed that a consultation is undertaken on the principles of applying the NFF in full and the treatment of a shortfall or surplus in the formula, but that no modelling of potential budget shares is included as the data is unavailable (at the time of writing this paper).

1.5 The paper sets out the rationale behind this proposal. It also asks Schools Forum to support the continued use of the optional exceptional circumstances factor for rent costs and the use of the optional very sparse secondary schools (VSSS) factor in 2027/28. If the proposals are supported by Schools Forum, five recommended questions to ask schools are presented. Once finalised the consultation will be launched on 12 October for a period of 2 weeks and the outcome will be reported to Schools Forum on 4 November who will asked to make a recommendation to Cabinet on the school funding formula for 2027/28, who will decide on the final formula at its meeting on 15 December.

2.0 Link to Council Plan Priorities

2.1 Ensuring that schools are appropriately funded is supportive of the Council Plan priorities that "People in Westmorland and Furness are healthy, happy, active and able to lead fulfilling independent lives, thriving in their communities" and the commitment to reduce inequality and "ensure that young people have enough opportunities to access the best education".

3.0 Recommendation

3.1 The Schools Forum is asked to:

- note that the provisional DSG allocations for 2027/28 are not, at the time of writing, published and the impact of this;

- support the recommendation to consult all schools on the proposal to apply the NFF in full in 2027/28 and:

  a) if there is shortfall to reduce the basic per pupil funding factor values in the formula;

  or

  b) if there is a remaining balance transfer up to 0.5% to the High Needs Block.

- support the continued use of the optional exceptional circumstances factor to fund the cost of rents for 6 schools, subject to eligibility and DfE approval;

- support the use of the optional circumstances factor for very sparse secondary schools, subject to eligibility and DfE approval;

  and

- support the recommended five questions to ask schools at para 4.37.

4.0 Rationale and Evidence for the Recommendation

4.1 A NFF was introduced for schools from 2018/19 and since then local authorities have been able to decide, in consultation with schools and the Schools Forum whether to use the NFF to allocate funding to schools or apply a locally determined schools funding formula, within some restrictive parameters set by the DfE. In 2023/24 the DfE began the first year of transition towards a direct NFF, whereby all schools (including academies) were funded using a single NFF and in doing so placed further restrictions on local flexibility.

4.2 In 2026/27 Cabinet, on the recommendation of Schools Forum, decided the NFF would be used to allocate funding to schools and academies in Westmorland and Furness (W&F), as in previous years and since the introduction of the NFF in 2018/19. When the final DSG Schools Block allocation for W&F was published by the DfE in December 2025, after applying the NFF in full there was a shortfall of £0.95m which was managed through the removal of the optional growth fund budget of (£0.071m) and a small reduction in the basic per pupil unit values. There was no transfer to the High Needs Block.

DSG Allocations 2027/28

4.3 On 31 July 2026 the DfE informed local authorities that the publication of the school and local authority-level national funding formula allocations for 2027/28 will not take place until Autumn 2026. No release date has been confirmed.

4.4 Limited information on school funding arrangements for 2027/28 is available. This includes:

- The School Budget Support and FSM Expansion grants will be rolled into the schools NFF;

- There will be an adjust to the schools NFF to reflect the reduction in the Teachers' Pension Employer Contribution rate from 28.6% to 17.6%;

- The deadline for LAs to submit disapplication requests to the DfE is 16 November 2026.

4.5 It is assumed that Local authorities will continue to be responsible for deciding on local funding formulae for their mainstream schools and academies in 2027/28, subject to restrictions set by the DfE, and will continue to have flexibility to set aside growth or falling rolls budgets and transfer to up 0.5% to the High Needs Block, subject to Schools Forum approval, although these flexibilities have not yet been confirmed.

Local School Funding Formula 2027/28

4.6 It is proposed to consult schools on adopting the NFF in full in 2027/28 as in previous years for:

- budget certainty for schools and academies;

- continuity as the DfE's direction of travel is to move towards a 'hard' formula whereby school budgets will be set direct by DfE.

4.7 It is also proposed that the optional exceptional circumstances factor is continued to be used to support eligible schools with rent costs and to support very small sparse secondary schools (VSSS). DfE approval must be sought on an annual basis to use this factor for these purposes, no later than 16 November 2026.

4.8 A growth fund budget, which can be deducted from the Schools Block allocation before calculating school budget shares is **not** being proposed. This will ensure that the full Schools Block allocation is available for the school funding formula in 2027/28.

4.9 If there is a shortfall in Schools Block after allocating school budget shares on this basis, it will be managed by reducing the basic per pupil unit values within the allowable thresholds which have not yet been published.

4.10 However, if there is a balance remaining in the Schools Block it is proposed that up to a maximum of 0.5% is transferred to the High Needs block to support budget pressures. **This is subject to transfers between blocks still being allowable, to be confirmed by the DfE.** It is not possible to estimate the value of a 0.5% transfer as the Schools Block allocation is not yet known. Schools Forum are recommended to support this approach.

4.11 Alternatively, any balance remaining could be re-distributed through the school funding formula by increasing the basic per pupil unit values above the NFF levels. This would need to be within the allowable thresholds set by the DfE, which have not yet been published. There is a risk that this option may make applying the NFF in full unaffordable in future years as the additional funding would be built into the schools' budget share baselines, but the funding for this is not reflected in the notional school budgets used by the DfE to calculate local authority level core NFF funding. In both scenarios is it unlikely that there will be any significant surplus balance remaining in the Schools Block allocation after applying the NFF full.

4.12 Any change to basic per pupil funding, either to increase or decrease it, will not affect every schools' budget share as some will be protected through the Minimum Per Pupil Funding Levels (MPL) and Minimum Funding Guarantee (MFG) factors.

4.13 There can be a shortfall or balance remaining in the Schools Block after allocating the funding using the NFF due to the way in which local authorities are funded which comprises of 3 elements: pupil units, premises and growth/falling rolls funding. The actual 2027/28 primary and secondary pupil units of funding at local authority level are based on October 2025 census data however the NFF allocated to schools is based on October 2026 pupil data. Therefore, changes in pupil characteristics, such as eligibility for FSM or changes in attainment levels between years, are not reflected in the primary and secondary units of funding used to allocate the core NFF funding to local authorities in 2027/28 which is only updated for changes in pupil numbers. Premises funding consists of split sites, business rates and exceptional circumstances funding and is based on the previous year's funding levels and therefore any changes in values from one year to the next can impact on affordability. Growth/falling rolls funding is based on observed differences between primary and secondary pupils numbers within Medium Super Output areas (MSOAs) between October 2025 and October 2026 censuses. As pupil numbers are falling across the W&F area it is likely that funding through this factor, which has historically been used to support the school funding formula, is likely to be less than last year.

<u>Optional Exceptional Circumstances Factor - Rents</u>

4.14 As in previous years, the school funding formula includes the use of the optional exceptional circumstances factor to fund the cost of renting halls/school buildings/land for a small number of schools. The use of this factor can only apply to fewer than 5% of schools in the local authority area and the additional cost to the schools must be more than 1% of their school budget share to qualify for funding.

4.15 Each year the local authority must apply to the DfE for approval to continue to use this factor for this purpose. Evidence that the affected schools and Schools Forum have been consulted, is required.

4.16 In 2026/27 W&F applied to use the factor to support rent costs for 5 schools and received approval for 4 schools. The below table shows the rent cost amounts included in the 2026/27 school funding formula and expected for 2027/28:

School	Premises	2026/27	2027/28	Variance
Greystoke	Greystoke Village Hall	£6,608	£6,013	-£595
Levens	Land and Buildings Levens School	£13,477	£21,542	£8,065
Penruddock	Penruddock Village Hall	£4,561	£5,735	£1,174
Dallam	Dallam School at Heversham and fields	£150,000	£150,000	£0
St Cuthbert's	Parish Hall	£0	£9,350	£9,350
Old Hutton	Old Hutton Public Hall	n/a	£9,000	£9,000
	Total	£174,646	£201,640	£26,994

4.17 Some of the lease agreements are subject to review/renewal and therefore the 2027/28 figures above are estimates. Adjustments will be made for any under or overfunding in 2027/28 in the following year, if required. Two schools (St Cuthbert's and Old Hutton) newly meet the eligibility criteria in for rents funding and therefore W&F will be seeking DfE approval to use the factor for 6 schools in 2027/28.

4.18 Funding for this cost is included in the premises funding element of the Schools Block allocation based on the previous year's funding levels, therefore there is one-year lag for increases or decreases in rent costs which can impact on the overall affordability of the school funding formula, although the impact on school budget shares is minimal. Schools Forum are asked to confirm their continued support to apply this factor in 2027/28, subject to DfE approval.

Optional Exceptional Circumstances Factor – Very Sparse Secondary Schools

4.19 Local authorities can submit a disapplication to the DfE to use the exceptional circumstances factor for VSSS up to a maximum of £50,000 per eligible school who would otherwise be unable to attract sufficient funding to remain viable. Schools must have:

- Pupils in years 10 and 11
- 350 pupils or fewer
- A sparsity distance of 5 miles or more

4.20 In 2026/27 W&F applied and received approval from the DfE to use this optional factor for 6 small secondary schools but it was agreed with Schools

Forum that it would only be applied in the school funding formula if it was affordable so as not to negatively impact on any other school/academy budget shares. As there was a shortfall in School Block funding when applying the NFF in 2026/27 the optional VSSS factor was not used.

4.21 However, financial challenges faced by W&F small rural secondary schools continue to be a significant concern, The DfE acknowledge that the sparsity factor within the NFF does not fully recognise the challenges these financially vulnerable schools face by allowing LAs to apply to use the optional VSSS factor. W&F will be applying to the DfE to seek approval for the use of this factor in 2027/28. The Schools Forum is asked to support this request.

4.22 It is acknowledged that the use of the factor may impact on affordability of the NFF in 2027/28, as the School Block funding for VSSS, like the business rates and rents factors, is lagged by one year. This means that it may result in a requirement to reduce the basic per pupil unit values for all schools for it to be affordable, although this would be a temporary for one year only.

4.23 It is not possible to model the actual impact for 2027/28 as the provisional Schools Block allocations have not yet been published. However, some indicative modelling has been undertaken using 2026/27 data to show the impact on school budget shares had the VSSS been applied in 2026/27. Based on this data the below 6 schools would have met the eligibility criteria:

School Name	Phase	Pupil Numbers (Oct 25)	Sparsity Distance (miles)
Samuel King's School	Secondary	117	16.66
John Ruskin School	Secondary	247	9.73
Queen Elizabeth Studio School	Secondary	263	5.55
Settlebeck School	Secondary	203	11.99
Kirkby Stephen Grammar School	Secondary	322	10.31
Appleby Grammar School	Secondary	320	9.90

4.24 It should be noted that sparsity distance measurement can change each year as it’s calculated by taking all the pupils for whom the school is the nearest compatible school and find the average road distance from these pupils’ home postcode to their second nearest compatible school. This means that any schools close to the 5 mile threshold may not be eligible in 2027/28.

4.25 LAs can apply a higher distance threshold and/or apply a taper to the unit value so that schools with higher sparsity distances would get more funding than those with lower distances. However, for the additional funding to make a meaningful difference to eligible schools a unit value of £50,000 has been applied in the modelling. The modelling showing the impact on all school budget shares is at Appendix 1.

4.26 The below table summarises the impact on the 6 eligible school budget shares (Model 1):

School Name	Number on Roll	26-27 Post MFG Budget	26-27 Post MFG Budget with VSSS	Increase

Samuel King's School	117	£1,109,480	£1,118,194	£8,714
John Ruskin School	247	£1,996,873	£2,010,366	£13,493
Queen Elizabeth Studio School	263	£2,045,801	£2,086,509	£40,707
Settlebeck School	203	£1,626,153	£1,665,706	£39,553
Kirkby Stephen Grammar School	322	£2,431,121	£2,477,445	£46,324
Appleby Grammar School	320	£2,459,120	£2,505,457	£46,337

4.27 The Model 1 shows that even though an additional £50,000 has been added to each eligible school's funding formula none of the schools will receive the fall impact of additional funding, due to 2 reasons:

- Affordability – in order to add an additional £50,000 x 6 schools into the school funding formula, the basic per pupil unit value for all schools/acadmies needs to reduce to offset the increase, including the schools eligible for the additional £50,000.

- Minimum Funding Guarantee - Some schools (Samuel Kings and John Ruskin) were in receipt of Minimum Funding Guarantee (MFG) protection in 2026/27 meaning that an increase in the school funding formula results in a reduction in the level MFG protection funding.

4.28 Under this scenario the basic per pupil unit values for all schools/academies would need to reduce as follows:

Description	**26-27 Actual**	**26-27 with VSSS**	**Reduction**
Primary (Years R-6)	£4,060.39	£4,052.60	-£7.79
Key Stage 3 (Years 7-9)	£5,680.95	£5,670.06	-£10.89
Key Stage 4 (Years 10-11)	£6,404.31	£6,392.03	-£12.28

4.29 The only way for the 6 eligible schools to receive the full impact of the additional £50,000 (albeit with reduced basic per pupil unit values) would be to make a technical adjustment to the MFG calculation. This may require a disapplication request which would be subject to DfE approval, confirmation is being sought. If this were allowable the modelled impact on the 6 schools budget shares would be as follows (Model 2):

School Name	Number on Roll	26-27 Post MFG Budget	26-27 Post MFG Budget with VSSS	Increase
Samuel King's School	117	£1,109,480	£1,159,480.04	£50,000
John Ruskin School	247	£1,996,873	£2,046,872.84	£50,000
Queen Elizabeth Studio School	263	£2,045,801	£2,095,801.32	£50,000
Settlebeck School	203	£1,626,153	£1,676,153.17	£50,000
Kirkby Stephen Grammar School	322	£2,431,121	£2,475,665.70	£44,545
Appleby Grammar School	320	£2,459,120	£2,503,685.03	£44,565

4.30 Again, not all schools would see the full impact of the additional £50,000. In order for the funding formula to be affordable the basic per pupil unit values would need to reduce further, as follows:

Description	26-27 Actual	26-27 with VSSS	Reduction
Primary (Years R-6)	£4,060.39	£4,048.84	-£11.55
Key Stage 3 (Years 7-9)	£5,680.95	£5,664.79	-£16.16
Key Stage 4 (Years 10-11)	£6,404.31	£6,386.09	-£18.22

4.31 Under this scenario, 2 additional schools (Queen Elizabeth Studio and Settlebeck) would become newly eligible for MFG protection funding as the reduced basic per pupil unit values would bring their MFG per pupil funding below their 2025/26 MFG baseline. Kirkby Stephen Grammar and Appleby Grammar are not in receipt of MFG as their per pupil funding in 2026/27 is above the MFG threshold and therefore although £50,000 has been added to their funding formula they are still impacted by the reduction in basic per pupil unit values.

4.32 In terms of 135 schools/academies not in receipt of VSSS funding, not all of them would be impacted by the reduction in the basic per pupil unit value. Model 2 shows that 14 primaries and 2 secondaries would have seen no change in their funding allocation as they would be in receipt of MFG/MPPL protection funding. Fifty primary schools would experience a reduction of less than £1,000 and 57 primaries would have a reduction greater than £1,000 with the highest loss being £4,703 for a primary with 407 pupils. Eleven secondary schools would see a reduction greater than £6,000 with the highest loss being £21,752 for a secondary school with 1,281 pupils. The one all-through school would have experienced a reduction of £7,271.

4.33 The actual impact of VSSS and other factors influencing affordability will not be known until:

- Confirmation from the DfE of school funding arrangements for 2027/28
- the DfE release the final dataset to be used to calculate school budget shares in December 2026
- outcome of disapplication requests.

4.34 It should also be noted that the 2027/28 school funding formula impacts maintained schools from 1 April 2027 and academies from September 2027.

4.35 Schools Forum are asked to consider the VSSS modelling and support W&F's proposal to submit a disapplication request to the DfE to apply this factor in 2027/28.

School Funding Formula Consultation 2027/28

4.36 Subject to Schools Forum support, W&F intends to consult all mainstream schools and academies on the principles that will apply if there is a shortfall or surplus on the Schools block after allocating the funding on the basis of the NFF and the use of the exceptional circumstances factors for rents and very sparse secondary schools.

4.37 The consultation will include the following 5 questions:

1) Do you agree with your Schools Forum recommendation that the National Funding Formula continues to be used to allocate funding to schools in 2027/28?
2) Do you agree the continued use of the optional exceptional circumstances factor to support eligible schools with rent costs, subject to DfE approval?
3) Do you agree that the optional exceptional circumstances factor should be used to support very sparse secondary schools, subject to DfE approval?
4) Do you agree that, if there is a shortfall in Schools Block funding after applying the National Funding Formula in full that this is managed by reducing the basic per pupil funding factor?
5) Do you agree that, if there is any Schools Block funding remaining (up to a maximum of 0.5%) after allocating the school funding formula to schools using the NFF, it should be transferred to the High Needs Block? (***subject to confirmation that block transfers are allowable)***

4.38 The consultation period will run from 12 October to 23 October. If the DfE announce further funding information before the consultation start date this will be taken into consideration. A draft consultation document will be circulated to Schools Forum members by email before finalising. Once the outcome of the consultation is known the Schools Forum will be asked to make a recommendation to Cabinet on the school funding formula for 2027/28.

5.0 Options

5.1 Schools Forum can:

- support the recommendation in principle to adopt the National Funding Formula in full in 2027/28 and:

  a) if there is shortfall to reduce the basic per pupil unit values in the formula;

  and

  b) if there is a remaining balance transfer up to 0.5% to the High Needs Block.

- support the continued use of the optional exceptional circumstances factor to fund the cost of renting halls/school buildings for 6 schools, subject to eligibility and DfE approval;

- support the use of the optional circumstances factor for very sparse secondary schools subject to eligibility and DfE approval;

and:

- support the five draft recommended questions to ask schools as set out above;

  or

- recommend alternative questions to ask schools.

6.0 Financial and Other Relevant Implications

6.1 Resource and value for money implications are considered throughout this report. No equality/legal/ implications have been identified at this stage.

11 September 2026

Appendices:

1. Modelled impact of Very Small Sparse Secondary Schools funding on 2026/27 school budget shares.

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Westmorland & Furness Council
A great place to live, work and thrive.
Our Values
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Impact of Very Small Sparse Secondary School factor at £50,000 with and without MFG Adjustment on 2026-27 School Funding Formula

(schools in receipt of VSSS factor are highlighted in green below)

				Model 1 - VSSS at £50,000			Model 2 - VSSS at £50,000 with MFG adjustment		
URN	LAESTAB	School Name	Number on Roll	26-27 Post MFG Budget	26-27 Post MFG Budget with VSSS	Variance	26-27 Post MFG Budget	26-27 Post MFG Budget with VSSS	Variance
Total			**26,192**	**£180,079,376**	**£180,079,360**	**-£16**	**£180,079,376**	**£180,079,373**	**-£4**
139422	9432000	St Martin & St Mary Church of England Primary School	281	£1,459,925	£1,459,925	£0	£1,459,925	£1,459,924.91	£0
112101	9432004	Alston Primary School	92	£644,478	£643,761	-£716	£644,478	£643,414.71	-£1,063
112102	9432005	Armathwaite School	58	£488,506	£488,054	-£452	£488,506	£487,835.65	-£670
112111	9432028	Greystoke Primary School	48	£428,843	£428,843	£0	£428,843	£428,842.62	£0
112116	9432040	Nenthead Primary School	14	£286,998	£286,889	-£109	£286,998	£286,836.67	-£162
112117	9432045	Brunswick School	109	£738,230	£737,381	-£849	£738,230	£736,970.61	-£1,260
112118	9432046	North Lakes School	160	£1,012,238	£1,010,992	-£1,246	£1,012,238	£1,010,389.01	-£1,849
112120	9432054	Plumpton School	87	£612,086	£611,408	-£677	£612,086	£611,080.56	-£1,005
112121	9432058	Skelton School	82	£575,254	£574,615	-£639	£575,254	£574,306.49	-£948
112176	9432301	Bolton Primary School	56	£476,692	£476,256	-£436	£476,692	£476,044.60	-£647
112177	9432302	Brough Community Primary School	75	£571,920	£571,339	-£582	£571,920	£571,338.70	-£582
112178	9432305	Clifton Primary School	65	£538,515	£538,008	-£506	£538,515	£537,763.49	-£751
112179	9432308	Holme Primary School	108	£684,125	£683,284	-£841	£684,125	£682,876.88	-£1,248
112180	9432310	Kirkby Stephen Primary School	169	£957,900	£956,584	-£1,316	£957,900	£955,946.96	-£1,953
112182	9432313	Long Marton School	71	£555,596	£555,044	-£553	£555,596	£554,776.01	-£820
112183	9432314	Milburn School	19	£314,086	£313,938	-£148	£314,086	£313,866.48	-£220
112184	9432315	Milnthorpe Primary School	155	£918,734	£917,527	-£1,207	£918,734	£916,943.09	-£1,791
112190	9432321	Heron Hill Primary School	370	£1,941,956	£1,941,956	£0	£1,941,956	£1,941,955.68	£0
112191	9432322	Goodly Dale Primary School	70	£508,051	£507,506	-£545	£508,051	£507,242.56	-£809
112192	9432403	Chapel Street Infants and Nursery School	52	£420,616	£420,616	£0	£420,616	£420,616.11	£0
112195	9432407	Hawkshead Esthwaite Primary School	31	£365,167	£364,926	-£241	£365,167	£364,809.10	-£358
112197	9432413	Croftlands Infant School	85	£565,997	£565,335	-£662	£565,997	£565,014.71	-£982
112198	9432414	Croftlands Junior School	154	£885,261	£884,062	-£1,199	£885,261	£883,481.92	-£1,780
112199	9432502	Brisbane Park Infant School	96	£736,738	£735,991	-£748	£736,738	£735,628.85	-£1,109
112206	9432509	Greengate Junior School	161	£1,136,267	£1,135,013	-£1,254	£1,136,267	£1,134,406.23	-£1,860
112207	9432511	Roose School	197	£1,118,544	£1,117,009	-£1,534	£1,118,544	£1,116,267.16	-£2,276
112208	9432512	Ramsden Infant School	71	£577,347	£576,794	-£553	£577,347	£576,526.42	-£820
112210	9432514	Victoria Infant and Nursery School	161	£928,355	£927,101	-£1,254	£928,355	£926,494.52	-£1,860
112212	9432518	South Walney Infant and Nursery School	112	£715,689	£715,689	£0	£715,689	£715,688.90	£0
112213	9432521	Dane Ghyll Community Primary School and Nursery	209	£1,159,742	£1,158,115	-£1,628	£1,159,742	£1,157,327.18	-£2,415
112232	9432627	Sir John Barrow School	207	£1,146,718	£1,145,106	-£1,612	£1,146,718	£1,144,452.48	-£2,266
112233	9432700	Sedbergh Primary School	151	£839,712	£839,712	£0	£839,712	£839,712.24	£0
112234	9432701	George Romney Junior School	74	£541,081	£540,505	-£576	£541,081	£540,225.97	-£855
112236	9432704	Barrow Island Community Primary School	168	£1,122,985	£1,121,677	-£1,308	£1,122,985	£1,121,043.57	-£1,941
112248	9433013	High Hesket CofE School	119	£717,492	£716,565	-£927	£717,492	£716,116.50	-£1,375
112253	9433019	Kirkoswald CofE School	43	£385,581	£385,246	-£335	£385,581	£385,083.72	-£497
112255	9433021	Langwathby CofE Primary School	157	£885,313	£885,313	£0	£885,313	£885,313.32	£0
112262	9433054	Levens CofE School	87	£616,356	£615,679	-£677	£616,356	£615,350.93	-£1,005
112263	9433056	Old Hutton CofE School	74	£539,851	£539,275	-£576	£539,851	£538,996.07	-£855
112264	9433057	Staveley CofE School	81	£605,910	£605,279	-£631	£605,910	£604,973.71	-£936
112265	9433058	Storth CofE School	69	£496,321	£495,784	-£537	£496,321	£495,523.83	-£797
112266	9433059	Temple Sowerby CofE Primary School	43	£425,947	£425,612	-£335	£425,947	£425,450.47	-£497
112267	9433061	Asby Endowed School	21	£325,824	£325,661	-£164	£325,824	£325,581.47	-£243
112269	9433064	Vicarage Park CofE Primary School	102	£673,172	£672,377	-£794	£673,172	£671,993.00	-£1,179
112279	9433122	Coniston CofE Primary School	57	£488,575	£488,131	-£444	£488,575	£487,916.68	-£659
112280	9433123	Grange CofE Primary School	160	£917,396	£916,150	-£1,246	£917,396	£915,546.81	-£1,849
112281	9433124	Burlington CofE School	69	£548,735	£548,197	-£537	£548,735	£547,937.27	-£797
112282	9433125	Allithwaite CofE Primary School	90	£562,648	£562,635	-£13	£562,648	£562,634.82	-£13
112283	9433126	Cartmel CofE Primary School	47	£475,492	£475,126	-£366	£475,492	£474,949.26	-£543
112284	9433128	Pennington CofE School	209	£1,102,473	£1,100,846	-£1,628	£1,102,473	£1,100,058.40	-£2,415
112286	9433130	Lindale CofE Primary School	45	£422,293	£421,942	-£350	£422,293	£421,772.90	-£520
112287	9433132	Broughton CofE Primary and Nursery School	104	£682,501	£681,691	-£810	£682,501	£681,299.14	-£1,202
112289	9433150	St George's CofE School	190	£1,374,869	£1,373,389	-£1,480	£1,374,869	£1,372,673.38	-£2,196
112299	9433212	Low Furness CofE Primary School	118	£739,472	£738,553	-£919	£739,472	£738,108.04	-£1,364
112301	9433304	Calthwaite CofE School	69	£534,989	£534,452	-£537	£534,989	£534,191.93	-£797
112302	9433305	Culgaith CofE School	47	£418,969	£418,603	-£366	£418,969	£418,425.84	-£543
112303	9433309	Ivegill CofE School	75	£568,765	£568,181	-£584	£568,765	£567,897.94	-£867
112307	9433319	Stainton CofE Primary School	101	£669,256	£668,470	-£787	£669,256	£668,089.13	-£1,167
112313	9433354	Beetham CofE Primary School	42	£385,472	£385,145	-£327	£385,472	£384,986.46	-£485
112314	9433355	St Oswald's CofE Primary School	77	£564,307	£563,707	-£600	£564,307	£563,417.03	-£890
112315	9433356	Crosby Ravensworth CofE School	29	£338,027	£337,802	-£226	£338,027	£337,692.38	-£335
112316	9433357	Crosscrake CofE Primary School	45	£399,752	£399,752	£0	£399,752	£399,752.44	£0
112317	9433358	Crosthwaite CofE School	97	£654,726	£653,971	-£755	£654,726	£653,605.28	-£1,121
112318	9433359	St Patrick's CofE School	78	£559,597	£558,990	-£607	£559,597	£558,696.15	-£901
112319	9433360	Grasmere CofE Primary School	77	£569,322	£568,723	-£600	£569,322	£568,432.65	-£890
112320	9433361	Grayrigg CofE School	67	£535,566	£535,045	-£522	£535,566	£534,792.19	-£774
112321	9433362	Langdale CofE School	29	£349,604	£349,378	-£226	£349,604	£349,268.60	-£335
112322	9433365	St Thomas's CofE Primary School	211	£1,206,514	£1,204,871	-£1,643	£1,206,514	£1,204,076.15	-£2,438
112323	9433367	St Mary's CofE Primary School	194	£1,025,285	£1,023,774	-£1,511	£1,025,285	£1,023,042.92	-£2,242
112324	9433368	Morland Area CofE Primary School	103	£647,248	£646,446	-£802	£647,248	£646,058.23	-£1,190
112325	9433370	St Mark's CofE Primary School	184	£992,434	£991,001	-£1,433	£992,434	£990,308.15	-£2,126
112326	9433372	Patterdale CofE Primary School	21	£310,537	£310,373	-£164	£310,537	£310,293.93	-£243

URN	LAESTAB	School Name	Number on Roll	26-27 Post MFG Budget	26-27 Post MFG Budget with VSSS	Variance	26-27 Post MFG Budget	26-27 Post MFG Budget with VSSS	Variance	
112327	9433373	Selside Endowed CofE Primary School	30	£342,148	£341,915	-£234	£342,148	£341,801.70	-£347	
112328	9433374	Shap Endowed CofE Primary School	75	£557,938	£557,354	-£584	£557,938	£557,071.27	-£867	
112331	9433381	Dent CofE Voluntary Aided Primary School	25	£322,434	£322,239	-£195	£322,434	£322,144.97	-£289	
112342	9433451	Lowther Endowed School	35	£391,516	£391,244	-£273	£391,516	£391,111.68	-£404	
112343	9433452	Dean Barwick Primary School	46	£427,664	£427,306	-£358	£427,664	£427,132.61	-£532	
112356	9433550	Leven Valley CofE Primary School	66	£500,345	£499,831	-£514	£500,345	£499,582.11	-£763	
112361	9433557	Church Walk CofE Primary School	87	£557,827	£557,149	-£677	£557,827	£556,821.57	-£1,005	
112362	9433601	St James' CofE Junior School	116	£840,100	£839,197	-£903	£840,100	£838,759.46	-£1,340	
112364	9433603	St Columba's School	188	£1,056,355	£1,054,891	-£1,464	£1,056,355	£1,054,182.94	-£2,172	
112366	9433607	Holy Family Catholic Primary School	195	£1,083,003	£1,081,484	-£1,519	£1,083,003	£1,080,749.48	-£2,253	
112372	9433656	Warcop CofE Primary School	87	£646,119	£645,442	-£677	£646,119	£645,113.70	-£1,005	
112406	9435204	St Paul's CofE Junior School	70	£528,807	£528,262	-£545	£528,807	£527,998.38	-£809	
112408	9435206	Appleby Primary School	146	£855,590	£854,453	-£1,137	£855,590	£853,902.78	-£1,687	
112409	9435207	Askam Village School	158	£890,808	£889,578	-£1,230	£890,808	£888,982.68	-£1,826	
112410	9435208	Flookburgh CofE Primary School	48	£430,117	£429,744	-£374	£430,117	£429,562.68	-£555	
112412	9435210	Dalton St Mary's CofE Primary School	190	£1,084,045	£1,082,565	-£1,480	£1,084,045	£1,081,849.40	-£2,196	
112415	9435213	Ireleth St Peter's CofE Primary School	65	£452,143	£451,637	-£506	£452,143	£451,392.00	-£751	
112419	9435217	Orton CofE School	44	£415,082	£414,739	-£343	£415,082	£414,573.17	-£508	
112423	9435221	Beaconside CofE Primary School	404	£2,149,774	£2,146,628	-£3,146	£2,149,774	£2,145,106.11	-£4,668	
112119	9435225	Penruddock Primary School	46	£437,901	£437,901	£0	£437,901	£437,900.99	£0	
112378	9434011	Samuel King's School	117	£1,109,480	£1,118,194	£8,714	£1,109,480	£1,159,480.04	£50,000	VSSS
112379	9434056	The Lakes School	369	£2,836,606	£2,832,373	-£4,233	£2,836,606	£2,830,325.05	-£6,281	
112383	9434150	Dowdales School	877	£6,470,591	£6,460,603	-£9,988	£6,470,591	£6,455,769.64	-£14,821	
112384	9434151	John Ruskin School	247	£1,996,873	£2,010,366	£13,493	£1,996,873	£2,046,872.84	£50,000	VSSS
112385	9434152	Ulverston Victoria High School	964	£6,894,907	£6,883,828	-£11,079	£6,894,907	£6,878,467.06	-£16,440	
112393	9434310	Ullswater Community College	1,281	£9,165,748	£9,151,090	-£14,659	£9,165,748	£9,143,996.51	-£21,752	
150507	9432001	Kirkby Thore School	29	£352,687	£352,598	-£89	£352,687	£352,597.62	-£89	
150005	9432002	Cambridge Primary School	191	£1,315,585	£1,314,098	-£1,487	£1,315,585	£1,313,378.33	-£2,207	
141978	9432003	Ambleside CofE Primary School	57	£494,818	£494,374	-£444	£494,818	£494,159.44	-£659	
145137	9432017	Tebay Primary School	42	£429,904	£429,577	-£327	£429,904	£429,418.39	-£485	
145138	9432018	Yanwath Primary School	152	£854,251	£853,067	-£1,184	£854,251	£852,494.15	-£1,756	
138744	9432318	Ghyllside Primary School	391	£2,051,762	£2,048,717	-£3,045	£2,051,762	£2,047,243.48	-£4,518	
137962	9432319	Stramongate Primary School	236	£1,334,872	£1,333,035	-£1,838	£1,334,872	£1,332,145.27	-£2,727	
142693	9432320	Castle Park School	273	£1,401,668	£1,401,668	£0	£1,401,668	£1,401,667.50	£0	
149655	9432404	Lindal and Marton Primary School	65	£437,895	£437,895	£0	£437,895	£437,895.22	£0	
149351	9432406	Newton Village Academy	60	£429,946	£429,478	-£467	£429,946	£429,252.18	-£693	
142247	9432507	Victoria Academy	208	£1,127,959	£1,126,339	-£1,620	£1,127,959	£1,125,555.32	-£2,404	
142249	9432508	Parkside Academy	206	£1,293,037	£1,291,433	-£1,604	£1,293,037	£1,290,656.64	-£2,380	
149244	9432513	Vickerstown School	143	£938,340	£937,227	-£1,114	£938,340	£936,687.67	-£1,652	
149960	9432515	South Walney Junior School	207	£1,217,770	£1,216,158	-£1,612	£1,217,770	£1,215,378.11	-£2,392	
142248	9432522	Yarlside Academy	218	£1,119,843	£1,119,843	£0	£1,119,843	£1,119,843.00	£0	
149961	9432712	Newbarns Primary and Nursery School	407	£2,170,623	£2,167,454	-£3,169	£2,170,623	£2,165,920.35	-£4,703	
149295	9432715	Ormsgill Nursery and Primary School	149	£1,101,613	£1,100,453	-£1,160	£1,101,613	£1,099,891.20	-£1,722	
137537	9433052	Burton Morewood CofE Primary School	126	£761,661	£760,680	-£981	£761,661	£760,205.40	-£1,456	
148607	9433115	Threlkeld CofE Primary School	37	£379,634	£379,634	£0	£379,634	£379,634.42	£0	
141711	9433310	Lazonby C of E Primary School	99	£647,713	£646,942	-£771	£647,713	£646,568.76	-£1,144	
151052	9433315	St Catherine's Catholic Primary School, Penrith	104	£653,046	£652,236	-£810	£653,046	£651,844.59	-£1,202	
137686	9433352	Arnside National CofE School	89	£608,057	£607,364	-£693	£608,057	£607,028.88	-£1,028	
148697	9433450	Dean Gibson Catholic Primary School, Kendal	122	£710,692	£709,742	-£950	£710,692	£709,282.64	-£1,410	
148698	9433453	St Cuthberts Catholic Primary School, Windermere	40	£366,791	£366,791	£0	£366,791	£366,791.03	£0	
149513	9433551	Our Lady of the Rosary Catholic Primary School, Dalton-In-	78	£554,697	£554,089	-£607	£554,697	£553,795.57	-£901	
149541	9433552	St Mary's Catholic Primary School, Ulverston	116	£667,235	£666,332	-£903	£667,235	£665,894.63	-£1,340	
140306	9433556	Penny Bridge CofE School	126	£739,240	£738,258	-£981	£739,240	£737,783.60	-£1,456	
148699	9433602	Sacred Heart Catholic Primary School, Barrow	174	£1,299,467	£1,298,112	-£1,355	£1,299,467	£1,297,456.53	-£2,011	
149498	9433606	St Pius X Catholic Primary School, Barrow	185	£1,174,341	£1,172,900	-£1,441	£1,174,341	£1,172,202.88	-£2,138	
141041	9434003	Walney School	473	£3,659,638	£3,654,219	-£5,418	£3,659,638	£3,651,597.34	-£8,040	
143749	9434013	Queen Elizabeth Studio School	263	£2,045,801	£2,086,509	£40,707	£2,045,801	£2,095,801.32	£50,000	VSSS
137269	9434060	Settlebeck School	203	£1,626,153	£1,665,706	£39,553	£1,626,153	£1,676,153.17	£50,000	VSSS
148702	9434634	St Bernards Catholic High School, Barrow	630	£4,981,842	£4,974,616	-£7,226	£4,981,842	£4,971,118.96	-£10,723	
136671	9435400	Kirkbie Kendal School	891	£6,176,193	£6,165,982	-£10,211	£6,176,193	£6,161,040.54	-£15,152	
136732	9435401	Queen Elizabeth Grammar School Penrith	799	£5,337,273	£5,337,273	£0	£5,337,273	£5,337,272.50	£0	
136526	9435404	The Queen Katherine School	771	£5,409,119	£5,400,330	-£8,789	£5,409,119	£5,396,077.22	-£13,041	
137205	9435405	Dallam School	679	£5,104,034	£5,096,172	-£7,861	£5,104,034	£5,092,368.45	-£11,665	
137107	9435406	Kirkby Stephen Grammar School	322	£2,431,121	£2,477,445	£46,324	£2,431,121	£2,475,665.70	£44,545	VSSS
137251	9435407	Appleby Grammar School	320	£2,459,120	£2,505,457	£46,337	£2,459,120	£2,503,685.03	£44,565	VSSS
137338	9435410	Cartmel Priory CofE School	371	£2,721,429	£2,717,190	-£4,239	£2,721,429	£2,715,138.57	-£6,290	
136357	9435411	Queen Elizabeth School	1,007	£6,785,148	£6,785,148	£0	£6,785,148	£6,785,147.50	£0	
135940	9436908	Furness Academy	1,216	£9,321,576	£9,307,694	-£13,881	£9,321,576	£9,300,977.40	-£20,598	
141106	9436025	Chetwynde School	492	£3,250,918	£3,246,018	-£4,900	£3,250,918	£3,243,647.10	-£7,271	