

Notice of Meeting

Schools Forum

Monday 14 October 2024 at 5.00pm

Via Zoom

The meeting can be watched live here:

www.westberks.gov.uk/schoolsforumlive

Date of despatch of Agenda: Tuesday 7 October 2024

For further information about this Agenda, or to inspect any background documents referred to in Part I reports, please contact Jessica Bailiss on (01635) 503124
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Agenda - Schools Forum to be held on Monday 14 October 2024 (continued)

Forum Members: Reverend Mark Bennet, Nicolle Browning, Heather Codling, Iain Cottingham, Paul Davey, Jacque Davies, David Fitter, Richard Hand, Michelle Harrison, Keith Harvey, Jon Hewitt, Trevor Keable, Jo Lagares, Julie Lewry, Jo MacArthur, Jamie Morton, Chris Prosser, David Ramsden, Lesley Roberts, Graham Spellman (Chair), Phil Spray, Chloe Summerville, Edwin Towill and Charlotte Wilson

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Agenda - Schools Forum to be held on Monday 14 October 2024 *(continued)*

- 14 **Date and format of the next meeting**
Monday 2nd December 2024 at 5pm.

Sarah Clarke
Service Director: Strategy and Governance

If you require this information in a different format or translation, please contact
Stephen Chard on telephone (01635) 519462.



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Note: These Minutes will remain DRAFT until approved at the next meeting of the Committee

SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON MONDAY 15 JULY 2024

Present: Reverend Mark Bennet (Church of England Diocese), Nicolle Browning (Maintained Secondary School Headteacher), Councillor Heather Codling (Executive Portfolio Holder: Children and Family Services), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), Paul Davey (Maintained Primary School Governor), Jacquie Davies (Pupil Referral Unit Headteacher), Richard Hand (Trade Union), Michelle Harrison (Maintained Primary Schools), Keith Harvey (Maintained Primary School Headteacher), Trevor Keable (Academy School Governor), Jo Lagares (Maintained Primary School Headteacher), Jo MacArthur (Maintained Primary Headteacher), Maria Morgan (Maintained Nursery School Headteacher), Jamie Morton (Non School - Post 16 Providers), Chris Prosser (Maintained Secondary School Headteacher), David Ramsden (Maintained Secondary School Headteacher), Campbell Smith (Academy School Governor), Graham Spellman (Roman Catholic Diocese), Phil Spray (Maintained Primary School Governor) and Charlotte Wilson (Academy School Headteacher)

Also Present: Rose Carberry (Principal Adviser for School Improvement), AnnMarie Dodds (Executive Director - Children and Family Services), Melanie Ellis (Acting Head of Finance and Property), Nicola Ponton (SEN Manager) and Jessica Bailiss (Democratic Services Officer)

Apologies for inability to attend the meeting: Richard Hawthorne (Academy School Headteacher), Jon Hewitt (Maintained Special School Headteacher), Julie Lewry (Academy School Headteacher) and Gemma Piper (Academy Trust Representative)

PART I

1 Minutes of previous meeting dated 17th June 2024

RESOLVED that the minutes of the meeting held on 17th June 2024 were approved as a true and correct record and signed by the Chair.

2 Actions arising from previous meetings

It was noted that all actions were completed or in hand.

3 Declarations of Interest

Chris Prosser, Jacquie Davies, Nicolle Browning and Maria Morgan declared that they had an interest in agenda item seven due to being from a school with a surplus balance. As their interest was a prejudicial and pecuniary interest they would leave the meeting for the duration of the item and not take part in the vote.

4 Schools' Forum Membership and Constitution Report (Jess Bailiss)

Jess Bailiss introduced the report (Agenda Item 5), which aimed to review and assess the membership and Constitution, which the Schools' Forum was required to do on an annual basis. It was confirmed that there had not been any changes to legislation requiring a change to the Forum's current practise.

Table 1 showed that the number of pupils in each sector had remained broadly the same and therefore no changes were proposed to the structure of the membership at this time.

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No changes were proposed to the Constitution at the current time. The proposal was for the Forum to approve the membership and the Constitution from September 2024 and once approved the Schools' Forum webpage would be updated accordingly.

Trevor Keable asked for confirmation that section A - 1.2 and 1.3 of the Schools' Forum Constitution was correct, which set out areas the Local Authority (LA) must consult the Schools' Forum on annually in relation to school funding areas and areas that were decided by the Schools' Forum. Melanie Ellis believed that this had relevance to agenda item seven on the agenda (Surplus School and School Balance Statement), where the LA had made a proposal and the Schools' Forum were being asked to make a decision. It was confirmed that the Schools' Forum would be required to make the decision and vote on this item. Trevor Keable felt it was important for the Schools' Forum to be clear on the distinct differences between the items set out in section A (1.2 and 1.3) of the Constitution.

Trevor Keable referred to section 2.4 of the Constitution which set out the non-school members of the Schools' Forum and asked how the decision was made regarding how this membership was arranged. He noted that both the Roman Catholic Diocese and Church of England Diocese were mentioned in the DfE Bill however, this also suggested there could be other representative groups too and he queried why there was no one from a Mosque, given West Berkshire had a large Asian population. He was of the understanding that the Schools' Forum decided on the non-school membership however, queried what the logic had been for choosing the existing group. Jess Bailiss confirmed that the non-school membership was based on what was suggested in the Schools' Forum Regulations 2012 and Education Skills and Funding Agency's Good Practice Guidelines, and that this was likely decided when the West Berkshire Schools' Forum was formed. Jess Bailiss would look into this and why other faith groups were not represented.

Reverend Mark Bennet reported that several schools in West Berkshire were either Church of England or Roman Catholic schools. There were not any Muslim schools in the district although there were pupils. It depended on if the membership was based on the school level or community level. He was not against wider representation however, expected the membership was based on school level and this was the reason why the Roman Catholic Diocese and Church of England Diocese were represented on the Forum whilst others were not.

RESOLVED that Jess Bailiss would look at how the non-school membership was formed and why only the Church of England Diocese and Roman Catholic Diocese were represented currently.

5 **Scheme for Financing Schools (Melanie Ellis)**

Melanie Ellis introduced the report (Agenda Item 6), which presented the responses to the consultation on the updated Scheme for Financing Schools (SFS).

The SFS had been out to consultation with all schools and responses were detailed under section five. Changes had been made to the SFS where requested.

Melanie Ellis drew attention to the first response concerning section 5.14 of the SFS. This section had been amended to make it clearer regarding how schools could ask for revenue contributions to their capital.

Melanie Ellis referred to the response regarding the removal of the section under 7.2 of the SFS describing community facilities as part of the clawback mechanism. Melanie Ellis reported that she had been asked what 'community facilities' included and she clarified that these were facilities that were in consistent financial reporting codes (E31, E32, I16, I17) and as such they were excluded from the clawback calculation. Melanie Ellis added

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that it was also not referring to income generation but just the specific CFR codes mentioned above. Melanie Ellis suggested that schools should contact her directly if they required further information on this area.

Melanie Ellis reported that she had provided responses to other general queries about the SFS that had not resulted in any changes.

It was proposed and seconded that Schools Forum approve the suggested amendment and publish and adopt the updated SFS by 16th July 2024. At the vote the motion was carried.

RESOLVED that the Schools' Forum approved the updated SFS.

6 Surplus School and School Balance Statements (Melanie Ellis)

(Chris Prosser, Nicolle Browing, Jacquie Davies and Maria Morgan left the meeting at 5.18pm)

Melanie Ellis introduced the report (Agenda Item 7) and explained that some Part II information had also been circulated to members of the Schools' Forum. If anyone wished to discuss something specifically in relation to this information this would need to be done so confidentially in Part II.

Melanie Ellis explained that at the last meeting of the Schools' Forum in June 2024 it was approved that a clawback mechanism should be introduced from March 2024 and the maximum amount that could be clawed back each year was the amount of school balance in excess of 10% of their budget share. This was subject to leaving the schools with a minimum of £50,000 balance. It had been agreed that the Heads Funding Group (HFG) would review the commitments on the School Balance Statements and then a recommendation for an amount to be clawed back would be brought back to the Schools' Forum in July for approval. This process had been followed and the proposed amount to be clawed back from each school was included in section seven of the report. Two schools would be reviewed at the next meeting of the HFG, these were iCollege due to the different way the setting was funded and The Castle because members of the HFG wished to see the split between The Castle and the Castle at Theale.

Melanie Ellis drew attention to section eight of the report, which set out three areas raised by HFG that had required clarification. These areas had been checked and were clarified as follows:

- 1) Garland – check that the HR and toilet blocks are fully committed/spent: Melanie Ellis confirmed that these areas were fully committed/spent.
- 2) John Rankin – check that the £65k hardware has been committed/spent: Melanie Ellis confirmed that this had not been committed and spent but was due to be by the end of 2024/25. This funding could therefore be clawed back if the Schools' Forum wished to agree a different amount to what was set out in the report for the School.
- 3) Beedon – recommend taking the minimum (£15k) rather than zero: This was for consideration by the Schools' Forum.

AnnMarie Dodds confirmed that the process agreed by the Schools' Forum had been followed. Schools had made submissions and a four hour meeting had taken place where the HFG had gone through the detail for each school in question. The report provided by Melanie Ellis was essentially a summary of this meeting where schools had been invited along to answer questions about their balances.

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Lesley Roberts commented on why she felt the clawback had returned to the Forum for consideration and stated that it was because the Local Authority (LA) had wanted to appeal to the Department for Education (DfE), which in turn would have impacted more schools. The decision by the Forum to overturn the decision taken in December 2023, had been done in an effort to protect more schools. Lesley Roberts queried if the clawback amounts were agreed, if schools impacted would be able to appeal. There had been little time for schools to respond and they had been provided with only 15 minutes to attend the HFG. Lesley Roberts commented on the HFG being required to consider vast amounts of detail provided on each of the schools, which had needed to be read in a short amount of time. Lesley Roberts was of the view that schools should be able to appeal due to the way the decision had come about.

In response to the comments raised by Lesley Roberts, AnnMarie Dodds commented that the process had been agreed by the Schools' Forum and an appeals process had not been identified. To add this at the current stage would be adding something to the process that was subsequent to the original decision. If clawback amounts were not agreed, there would be two options available. All of the information could be provided to the Secretary of State, who could be asked to make a decision, or the Secretary of State could be approached and asked to revert to the original decision in line with the original consultation. This could result in a five and eight percent clawback position, which could be more detrimental to the schools involved than what was proposed currently however, this would be matter for the Secretary of State. Lesley Roberts stressed that her request was only for an appeal mechanism for schools in relation to the LA, due to the short amount of time involved.

AnnMarie Dodds stated that it was a Schools' Forum decision to revote on the clawback and not an LA decision. The LA had informed the Schools' Forum of the action it intended to take and subsequently the Schools' Forum had decided there should be a revote on the matter. For the LA to take the matter to the Secretary of State was the legitimate appeals process. AnnMarie Dodds voiced her concern that it was being implied that the LA had undermined the Schools' Forum. Lesley Roberts was of the view that it felt like this because the only reason the clawback from March 2024 had been approved was because more schools would be impacted if the LA appealed to the DfE. Lesley Roberts acknowledged that there was not an appeal process available for schools because the LA would again take the matter to appeal. Lesley Roberts was concerned that the Schools' Forum was not able to do the role it was supposed to do and was having to make the best of a bad situation.

Reverend Mark Bennet reported that he had not been present for the discussion at the last Forum meeting in June. He noted in the report that there were a number of 'avoidable items not committed' and he felt that 'not committed' items could cover a wide range of areas and he was not clear on where the line had been drawn or how it had been assessed in terms of the balances that schools could legitimately hold. Regarding commitments, Melanie Ellis reported that all the details had been provided in the balance statements/other documentation. Melanie Ellis referred to areas deemed avoidable and not committed within the tables and highlighted that most schools would be left with a balance that was sufficient to cover these areas.

Keith Harvey referred to the question on what was deemed avoidable and unavoidable and stated that the HFG had looked at all the financial statements and supporting documents however, as highlighted previously he had not had time to read through all the information in detail. The LA had therefore been asked to form a recommendation for the Schools' Forum. He queried for clarity how the decision was made regarding what was avoidable and unavoidable. He referred to Springfield Primary School and the rebuilding of their fort that would have to be knocked down as part of drainage works. Keith Harvey was of the view that this was a necessity. AnnMarie Dodds clarified that

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anything impacted by building works would form part of a building plan and returned to its previous state. The school had proposed keeping money separate for something that was already part of a building project. Regarding what was deemed committed, these were areas already underway or where purchase orders had already been raised. These areas had either been included as additional sums of funding or through schools holding onto ten percent plus any commitments, enabling the work to be completed.

David Ramsden acknowledged the difficulties referred to by Lesley Roberts and that individual schools would find decisions on clawback difficult. David Ramsden commented on the time spent on the matter and although the timescales for paperwork for the current meeting cycle had been short, members of the HFG and Forum had been dealing with the issues for months. The merit of going to the DfE had been discussed originally at HFG and concern had been raised regarding the risk of this in terms of more schools being involved and also the possibility of a harder cut. David Ramsden also referred to concerns about West Berkshire being moved into the DfE's Safety Valve Programme and commented that there had not yet been any mention at the current meeting of the real issue, which was that the High Needs Block (HNB) was significantly in deficit. David Ramsden felt that there had been robust, professional and sensitive consideration of all the issues. Many of the schools concerned would see money excluded from the clawback because it was already committed. A sensible rationale had been applied and it was not about the LA versus schools but rather about the HNB and what was being done to properly address the issues being faced.

Lesley Roberts clarified that she did not see the situation as the LA versus schools. Her concern was due to the way the LA was operating to get what was needed and the Schools' Forum was being used as a vehicle to get there. For transparency reasons Lesley Roberts felt that there should be an option for schools to appeal.

Charlotte Wilson reported that as Chair of the Secondary Heads Forum she had been asked to communicate that there had been concern raised about the amount of documentation the headteachers of the schools concerned had needed to prepare in the timescales, the robustness and consistency of the process and the impact on individuals in preparing for this meeting. Charlotte Wilson noted that there were two schools that would require a decision at a later stage as further information was required and she questioned the parity and fairness around this.

In response to Charlotte Wilson, AnnMarie Dodds clarified that a decision would be taken at a later stage for two schools because the mechanism for funding for alternative provision was different and needed approaching in a different way. The funding for the Castle and the Castle at Theale needed separating out so it could be identified where the surplus was.

Keith Harvey stated that he had come into the meeting unsure if he was going to abstain or vote for the motion. He stated that having listened to the discussion he planned to vote for the motion however, only due to the consequence that the matter would be taken to the DfE if not agreed. He stated he would therefore be voting reluctantly for the motion.

The Chair acknowledged the sensitivity and difficulty of the decision required however, encouraged members to vote either for or against the motion rather than abstaining due to the amount of work that had gone into the matter.

The Chair invited the Schools' Forum to consider the LA recommendation to agree the clawback amounts proposed for each school as detailed in section seven of the report. It was proposed and seconded by maintained school representatives that the recommendation be approved. At the vote the motion was carried.

RESOLVED that the clawback amounts proposed were approved by the Schools' Forum.

7 Update on the DfE's Delivering Better Value Programme (Hester Collicut)

(Chris Prosser, Jacquie Davies and Maria Morgan rejoined the meeting at 5.45pm)

Susan Tanner introduced the report (Agenda Item 8), which provided an update on the Delivering Better Value Programme (DBV) and its impact on the SEND system in West Berkshire, improving outcomes for children and young people.

Susan Tanner referred to the action from the last meeting and reported that the information within the report was a replica of what had been submitted to the DfE as part of West Berkshire's quarterly submission. Susan Tanner provided detail on the key points of the report as follows:

Progress against the implementation plan:

- Key posts in the programme team had been recruited to, enabling work to be pump primed and capacity to be increased in the first busy phases of the programme.
- The DBV Programme and the SEND and Inclusion Strategy were now fully aligned under the umbrella of Innovation in SEND. This enabled a single strategic approach, and a coherent delivery plan to work from. It also enabled the transformation programme work to continue as sustainable business as usual once the DBV Programme came to an end.
- DBV working groups were meeting regularly.
- Support was continuing with the Primary Care Forum to develop and increase its membership.

Grant Expenditure:

- Spend to date was £114k, which was lower than anticipated. This was primarily due to a delay in some recruitment and a delayed start to the Whole School Mental Health Project. There was a struggle to recruit to Educational Psychologist posts generally, so alternative ways to staff the project were being explored.

Work streams:

- An update was provided on the following two work streams, which was detailed under section four and five of the report respectively:
 - Clear communications with families and wider local partners to support access to services and the SEND System.
 - Enabling settings, schools and colleges to meet the diverse needs of their communities locally.

Deficit Management Plan:

- It was highlighted that the mitigated deficit as at 2027/28 was estimated to have increased by £4.5m to £65.9m. This was the mitigated deficit position.

Trevor Keable referred to section 3.2 of the report, which set out that two key posts had not yet been appointed to. He queried if there had been any change in this since the report had been written. Susan Tanner confirmed that the commissioning post had been appointed to and shortlisting had just taken place for the coordinator post and interviews were due to take place later that week. Susan Tanner confirmed that she was the Service Director for DBV. It was clarified that her appointment had been delayed and she was appointed in May 2024 rather than the beginning of April and this had formed part of the underspend.

Trevor Keable referred to the situation with Educational Psychologists (EPs), which schools were aware of. His understanding was that there was an issue around whether EPs were buying into the process. Susan Tanner believed that reference was being made to the delay with the School Mental Health Project and commented that the

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recruitment of EPs was challenging as they were in short supply. The recruitment and retention of EPs was an issue for every LA. Susan Tanner provided reassurance that the proposal for the School Mental Health Project had come from EPs themselves and they were the authors of the project initiation document.

RESOLVED that the Schools' Forum noted the report.

8 Deficit Schools (Melanie Ellis)

Melanie Ellis introduced the report (Agenda Item 9) on the outturn position of the nine schools (Beenham, Brimpton, Kennet Valley, Long Lane, Pangbourne, Spurcroft, St Finians, St John & St Nicolas Federation and St Josephs) that set a deficit budget in 2023/24. The report also provided detailed on four schools (Enborne, Hermitage, Theale and Woolhampton) closing 2023/24 with an unlicensed deficit.

Melanie Ellis drew attention to the summary under section 5.1 of the report. The combined position at the end of 2023/24 was £74k worse than the original budget. One school had ended the year with a surplus rather than a deficit and three schools had ended with a lower deficit than expected. Five schools had ended the year with higher deficits than planned. The details for individual schools were included under section five of the report.

Section six of the report provided details on the four schools that had ended the year with an unlicensed deficit. No further action was required for two of the schools as the deficits were expected to be paid off immediately. The other two schools had been asked for licensed applications for 2024/25.

The next report would be brought to the Forum in October and would detail all the schools being licensed for 2024/25.

Reverend Mark Bennet asked if anything had been learnt from the review of school deficits. Melanie Ellis suggested she could bring a report to the next meeting on this matter. The learning did not indicate that deficits were a result of the size or location of a school however, falling numbers of pupils was a significant factor.

RESOLVED that:

- Melanie Ellis to bring a report to the next meeting setting out the learning for why schools were in deficit.
- The Schools' Forum noted the report.

9 DSG Monitoring Report 2024/25 Month 3 (Lisa Potts)

Melanie Ellis introduced the report (Agenda Item 10), which provided the forecast financial position of the services funded by the Dedicated Schools Grant (DSG), highlighting any under or over spends, and to highlight the cumulative deficit on the DSG.

Melanie Ellis drew attention to Table One on page 63 of the agenda pack, which provided the forecast position at the end of June, which was an in-year deficit of £7m. The forecast cumulative deficit at the end of 2024/25 was £16.5m.

The table under section 5.11 of the report showed the surplus of deficit against each of the blocks. It could be seen the High Needs block was facing the majority of the deficit.

RESOLVED that the Schools' Forum noted the report.

10 Forward Plan

(Richard Hand joined the meeting at 6pm)

RESOLVED that the Schools' Forum noted the forward plan and contracts forward plan.

11 Date and Format of the next meeting

The next meeting of the Schools’ Forum would take place in person at Shaw House on Monday 14th October 2024.

Richard Hand stated that he had arrived late to the meeting and asked if he could read out a statement on behalf of Union Members in relation to item seven on the clawback. The Chair agreed to allow the statement to be read out as follows:

‘Whilst the unions recognise the collective value of the clawback mechanism and that the LA has to make efforts to deal with the SEND deficit, members across the teaching unions have raised concerns about the process and implications.

To be clear, we believe that the ultimate responsibility lies with central government as a result of years of underfunding which has put both the LA and heads in an invidious position. Perhaps some difficult decisions about clawback surpluses should also have been addressed, historically, in a more timely manner.

However, the unions would like the following items noted in the context of the vote on item 7 tonight:

1. There is a concern about the timescale of the process and that it has been rushed. This has therefore not given heads at surplus schools the time they need to effectively argue their case.
2. What are the parameters that define ‘Avoidable items not committed’ which are therefore included in clawback calculations? Unions would ask that these are more clearly defined. Also concerns around heads only being given 15 minutes at HFG to fight their corner.
3. Why have self-generated funds not been protected and excluded from clawback?
4. Will there be an appeal process for schools to contest the amount of clawback? It is our belief that there should be and that it is independently adjudicated.
5. DBV seems to be driving the process without schools affected feeling that they have any agency. Heads and schools are therefore feeling unsupported and there is a fear that the LA will ‘lose the dressing room’. LA has supported schools over the years very well in difficult circumstances. There is a sense that this is being lost as a result of a spreadsheet approach. The clawback sums are a relatively small part of the overall black hole in finance, but they are significant sums for the schools affected. There is a feeling that what will be a big impact for clawback schools will make very little difference within the wider context of council deficit.’

The Chair thanked Richard Hand for his comments and stated that most of the points had been covered as part of the discussion on the matter. It had been a very difficult discussion and a difficult decision had been reached.

(The meeting commenced at 5.00 pm and closed at 6.08 pm)

CHAIR

Date of Signature

Actions from previous meetings

Ref No.	Date of meeting (s)	Item	Action	Responsible Officer	Update
Mar24-Ac3	11th March 2024	HNB Budget 2024/25	Standing Action: The impact of other LAs in Delivering Better Value and Safety Valve Programme to be monitored. This to remain as an ongoing action for Schools' Forum meetings.	Hester Collicut	Standing update scheduled for meeting on 14th October.
Jul24-Ac1	15th July 2024	Schools' Forum Membership and Constitution Report	Jess Bailiss would look how the non-school membership was decided on and why only Church of England and Roman Catholic Diocese were represented.	Jess Bailiss	<p>The non-school membership is currently in line with the Schools' Forum Regulations. This can be reviewed as part of the annual review on the constitution to ensure this is still the case.</p> <p>As set out in the Schools' Forum Regulations, the non-school membership is based on school level rather than community level. Until there are schools with a differently designated religious character in the district, the Regulations do not suggest the inclusion of any other religious-based members at the current time.</p>
Jul24-Ac2	15th July 2024	Deficit Schools	Melanie Ellis to bring a report to the next meeting setting out the learning for why schools were in deficit.	Melanie Ellis	This item will be brought to the Schools' Forum meeting in December.

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Consultation 2025/26: Schools Funding Formula

Report being considered by: Schools Forum on 14th October 2024

Report Author: Melanie Ellis

Item for: Decision **By:** All Forum Members

1. Purpose of the Report

- 1.1 To set out the requirements and changes for setting the primary and secondary school funding formula for 2025/26 and to approve West Berkshire Council's funding proposals to go out to consultation with all schools.
- 1.2 In previous years, the DfE has announced provisional financial settlement information for each LA for the upcoming financial year by the end of July. This generally includes confirmed NFF per pupil funding rates to be paid to each individual LA and details of how funding rates and any other elements of the Funding Framework have changed.
- 1.3 The 2025-26 schools NFF will use the same factors as the 2024-25 NFF. However, the notional NFF allocations for schools for 2025-26 are yet to be published, with an indication as to the date being as soon as possible following the budget announcement on 30 October 2024. Due to the delay in the confirmation the NFF factor values, a modelling authority proforma tool (APT) for 2025-26 will not be provided.
- 1.4 A key feature of the budget setting process is the consultation with schools. This takes place each year for the Schools Forum to consider the outcomes early in the autumn. Despite the lack of notional allocations and confirmed factor values, it is important to still seek views from schools on the relevant areas of the budget that remain subject to local decision making.

2. Recommendations

- 2.1 Recommend to Schools Forum the consultation to be undertaken with all schools on:
 - (1) West Berkshire Council's proposed school funding formula for 2025/26
 - (2) An up to 0.5% transfer from the Schools Block to other funding blocks
 - (3) The criteria to be used to allocate additional funds
 - (4) The proposed services to be de-delegated.
- 2.2 The proposed areas of consultation will be decided by Schools Forum at its meeting of 14 October 2024. The consultation will be open for three weeks from 16 October 2024 to 6 November 2024. The principle consulted on and adopted in previous years, is to mirror as closely as possible to the NFF.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: <input checked="" type="checkbox"/>	No: <input type="checkbox"/>

3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
	A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x	
B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
Data Impact:		x		
Consultation and Engagement:	Schools Accountancy officers			

4. Introduction

- 4.1 2025/26 is the third year of transition to the direct schools National Funding Formula (NFF). Each Local Authority (LA) will continue to have some discretion over their schools funding formulae, in consultation with local schools.
- 4.2 The LA will remain responsible for determining final allocations to schools, in consultation with the Schools Forum. Political ratification must be obtained before the end of January 2025 deadline for submission.

5. National Funding Formula

- 5.1 2025/26 is the third year of transition to the direct schools NFF. Local authorities:

- (1) Must use all NFF factors other than the following optional factors: rates, PFI contracts and exceptional circumstances
 - (2) Will only be allowed to use NFF factors in their local formulae.
 - (3) Must move their local formula factor values at least 10% closer to the NFF, except where local formulae are already 'mirroring' the NFF.
 - (4) Will continue to set a minimum funding guarantee in local formulae
 - (5) Will again be able to transfer up to 0.5% of their total schools block allocations to other blocks of the DSG, with Schools Forum agreement. Without Schools Forum agreement, or where they wish to transfer more than 0.5% of their schools block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.
- 5.2 School funding through the NFF per pupil increases have yet to be confirmed in 2025/26.
- 5.3 High needs funding increases are yet to be announced for 2025/26.
- 5.4 The DfE recognises that some authorities still cannot afford to pay off the historic deficit from the DSG over the next few years. The DfE runs three programmes offering direct support to ensure effectiveness and sustainability of local authorities' high needs systems. West Berkshire is in group b, DBV.
- (a) Safety valve
 - (b) Delivering better value in SEND (DBV)
 - (c) ESFA support programme.
- 5.5 Central schools services funding in 2025/26 is yet to be announced. (2024/25 £304m). This funds the ongoing responsibilities that LAs deliver for all pupils.

6. Schools funding allocation

- 6.1 Yet to be announced. Expected after the budget announcement of 30.10.2024.

7. Local Formula

- 7.1 All schools and the Schools Forum will be consulted on the formula but it remains a Local Authority decision on how the funding is allocated to schools through the formula factors. There is no requirement to stick to the NFF rates but must use all the mandatory factors.

8. Block Transfers

- 8.1 Local authorities continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG, with Schools Forum approval.
- 8.2 Without Schools Forum agreement, or where they wish to transfer more than 0.5% of their schools block funding, local authorities must submit a disapplication request

to the Secretary of State by 18th November 2024. Evidence of Schools Forum discussion and voting would need to be provided.

- 8.3 The growth in the DSG deficit continues to be a significant challenge. The deficit grew from £4.8m in 2022/23 to £9.5m in 2023/24 and is forecast to reach £16.5m by the end of 2024/25. This is driven by the challenges in the High Needs Block and consideration should therefore be given as to whether to support a block transfer for 2025/26.

Reserve Balances (surplus)/deficit	1.4.2023 Actual	Movement	1.4.2024 Actual	Forecast Movement	31.3.2025 Forecast
	£m	£m	£m	£m	£m
Schools Block	(1,355)	265	(1,090)	94	(996)
Early Years Block	1,052	209	1,261	(42)	1,219
Central School Services Block	39	(38)	1	13	13
High Needs Block	5,070	4,266	9,336	6,984	16,320
Grant changes	(45)	(13)	(58)	0	(58)
Total Deficit Balance	4,761	4,689	9,450	7,049	16,499

- 8.4 Block transfers need to be approved annually. Transfers have previously been approved in 2020/21 0.25% (£263k), 2021/22 0.5% (£549k), 2022/23 0.25% (£300k) and 2024/25 0.25% (£335k) to support the High Needs Block. No transfer was approved in 2023/24.

9. Additional funds outside the School Formula

- 9.1 School funding regulations allow a few exceptional circumstances to be funded outside the formula and be top sliced from the DSG. The funds are:

- Growth funding.
- Funding for schools in financial difficulty (WBC discontinued).
- Funding from the high needs block to allocate to schools which have a disproportionate number of high needs pupils.
- A falling rolls fund (WBC discontinued).

Criteria for allocating these need to be agreed and are included in the consultation document at Appendix B and C.

10. De-delegations, Education Functions and Health & Safety Service (maintained schools)

- 10.1 De-delegated services are for maintained schools only. Funding for these services must be allocated through the formula but can be passed back, or 'de-delegated' for maintained primary and secondary schools with Schools Forum approval.
- 10.2 Education responsibilities held by local authorities for all schools are funded from the Central Schools Services Block of the DSG. Education responsibilities held by

local authorities for maintained schools only, are funded from maintained schools budgets, with agreement of the maintained schools members of schools forums.

- 10.3 In order to meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation, a full schools health and safety service will be provided to all maintained schools. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.

11. Proposals

- 11.1 To approve the attached consultation to go out to all schools. The consultation will last for 3 weeks from 16 October 2024 to 6 November 2024.

12. Conclusion

- 12.1 Since the government intends to move towards a “hard” NFF formula it is logical for West Berkshire to continue to replicate these rates as far as possible.
- 12.2 When the actual allocation is received in December the formula will be allocated according to the principles above with political ratification being made in January 2025.

13. Appendices

- Appendix A: Briefing and Consultation document for schools.
Appendix B: Criteria for awarding Growth Funding
Appendix C: Criteria for allocating the Additional High Needs Fund
Appendix D: Equalities Impact Assessment

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Appendix A

Schools Revenue Funding 2025 to 2026

Briefing & Consultation Document for Schools October 2024

1. How to respond to this consultation

- 1.1 Schools are invited to make comments on specific areas in the consultation. Please e-mail your response to Melanie Ellis, Service Lead for Financial Management, melanie.ellis@westberks.gov.uk by **6th November 2024**.
- 1.2 Any suggestions for change should be accompanied by clear rationale on why your proposal is a better solution and fair and equitable for all schools in West Berkshire Council (WBC), and not just for your own individual school. You should also check that it falls within the current funding regulations. Policy and operational documents relating to the 2025/26 National Funding Formula (NFF) can be accessed on this webpage:

[Pre-16 schools funding: local authority guidance for 2025 to 2026 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/guidance/pre-16-schools-funding-local-authority-guidance-for-2025-to-2026)
- 1.3 To aid understanding of the proposals in this paper, illustrations are provided in Appendix Ai) 1 for individual schools. These are based on Department for Education (DfE) data taken from the October 2023 census. This paper currently shows the 24/25 funding which will be updated in due course.
- 1.4 Schools should note that actual funding for 2025/26 will be based on the October 2024 pupil census and year on year changes in pupil data may have a significant impact. Therefore, in responding to this consultation, schools are advised to concentrate on the principles rather than simply on the illustrative cash changes.

2. Purpose

- 2.1 The purpose of this consultation is to outline and seek views on:
 - (1) West Berkshire Council's proposed school funding formula for 2025/26.
 - (2) An up to 0.5% transfer from the Schools Block to other funding blocks.
 - (3) The criteria to be used to allocate additional funds.
 - (4) The proposed services to be de-delegated.
- 2.2 The proposed areas of consultation will be decided by Schools Forum at its meeting of 14 October 2024. The consultation will be open for three weeks from 16 October 2024 to 6 November 2024. The principle consulted on and adopted in previous years, is to mirror as closely as possible to the NFF.

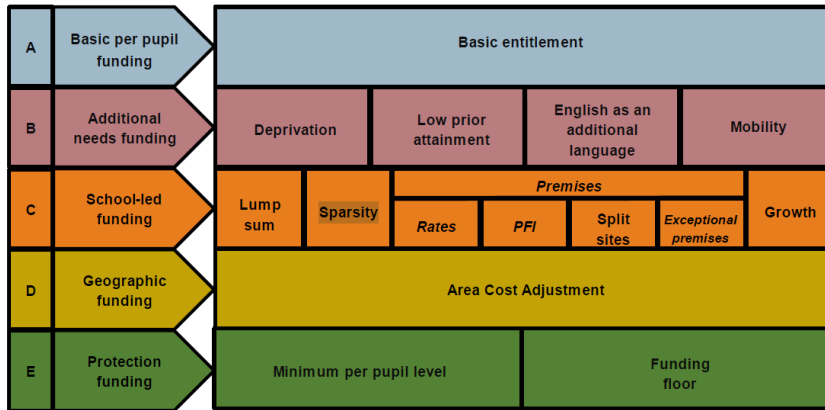
3. Introduction

- 3.1 All mainstream (academies and maintained) school funding is allocated to the Local Authority (LA) through the Dedicated Schools Grant (DSG). The grant is split into four funding blocks:
- (1) Schools,
 - (2) Early years,
 - (3) High needs,
 - (4) Central Schools Services (including school admissions, licences, finance support, schools' forum costs, education welfare etc).
- 3.2 The Schools Block is only for Primary and Secondary school formula allocations, plus growth funding for new or growing schools (such pupils are not included in the funding allocation as they did not exist in the previous census).
- 3.3 The Schools Block is ring fenced, but up to 0.5% can be transferred to other funding blocks subject to consultation with all schools and Schools' Forum agreement. Secretary of State approval is required for transfers above this limit or where the Schools' Forum has opposed the transfer but the LA wishes to appeal.
- 3.4 2025/26 is the third year of transition to the direct schools National Funding Formula (NFF). Local authorities:
- (1) Must use all NFF factors other than the following optional factors: rates, PFI contracts and exceptional circumstances
 - (2) Will only be allowed to use NFF factors in their local formulae.
 - (3) Must move their local formula factor values at least 10% closer to the NFF, except where local formulae are already 'mirroring' the NFF. (local factors within 2.5% of the respective NFF values are deemed to be mirroring the NFF).
 - (4) Will continue to set a minimum funding guarantee in local formulae, which in 2024/25 was between +0.0% and +0.5%.
 - (5) Will again be able to transfer up to 0.5% of their total schools block allocations to other blocks of the DSG, with schools forum approval. Without schools forum agreement, or where they wish to transfer more than 0.5% of their schools block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.
- 3.5 The LA is responsible for making the final decisions on the formula. Political ratification must be obtained before the end of January 2025 deadline.
- 3.6 The notional NFF allocations for schools for 2025/26 are to be published as soon as possible following the budget announcement on 30 October 2024. Due to the delay in the confirmation the NFF factor values, a modelling authority proforma tool (APT) for 2025/26 will not be provided.

- In December 2024 the funding allocations will be published using the October 2024 pupil numbers alongside the Schools Block DSG allocation.
- A sum for growth funding and falling rolls will be added to give the final DSG total.

4. The National Funding Formula (NFF)

4.1 The NFF structure is shown in the chart below.



The only structural changes being made to the NFF for 2025-26 are in relation to the PFI factor, and so will not affect WBC.

4.2 The NFF assigns funding rates to each of the factors.

4.3 The NFF in 2025 to 2026 will continue to provide funding protections

- minimum per pupil levels (MPPLs) - the MPPLs guarantee a minimum amount of funding for every pupil
- the funding floor protects schools from year-on-year funding decreases, by ensuring a minimum increase in pupil-led funding per pupil compared to the previous year. The NFF in 2025 to 2026 will continue to provide funding protections

4.4 The teachers' pay additional grant (TPAG) and the teachers' pension employer contribution grant (TPECG) 2024 will be rolled into the NFF for 2025/26. The more recently announced core schools budget grant (CSBG) will also be rolled into the schools NFF for 2025/26.

4.5 The table below sets out the national rates and West Berkshire's cost adjusted rates. **This is still based on 2024/25 funding.**

Factor	National Rate	WBC National Rate (with ACA)	WBC final rate (0% transfer)	National Rate	WBC National Rate (with ACA)	WBC final rate (0.25% transfer)	Total Funding after 0% transfer & growth funding	Total Funding after 0.25% transfer & growth funding
	2023/24			2024/25			2023/24	2024/25
Basic per pupil funding								
Primary AWPU	£3,394	£3,512	£3,501	£3,562	£3,690	£3,671	£45,367,600	£46,388,016
KS3 AWPU	£4,785	£4,952	£4,935	£5,022	£5,203	£5,176	£31,251,334	£32,836,687
KS4 AWPU	£5,393	£5,581	£5,563	£5,661	£5,865	£5,834	£22,367,127	£23,898,605
Minimum per pupil								
Primary	£4,405	£4,405	£4,405	£4,610	£4,610	£4,610		
Secondary	£5,715	£5,715	£5,715	£5,995	£5,995	£5,995		
Additional needs funding								
Deprivation								
Primary FSM	£480	£497	£497	£490	£508	£508	£6,061,528	£6,840,684
Secondary FSM	£480	£497	£497	£490	£508	£508		
Primary FSM6	£705	£730	£730	£820	£850	£850		
Secondary FSM6	£1,030	£1,066	£1,066	£1,200	£1,243	£1,243		
Primary IDACI A	£670	£693	£693	£680	£705	£705		
Primary IDACI B	£510	£528	£528	£515	£534	£534		
Primary IDACI C	£480	£497	£497	£485	£502	£502		
Primary IDACI D	£440	£455	£455	£445	£461	£461		
Primary IDACI E	£280	£290	£290	£285	£295	£295		
Primary IDACI F	£230	£238	£238	£235	£243	£243		
Secondary IDACI A	£930	£962	£962	£945	£979	£979		
Secondary IDACI B	£730	£755	£755	£740	£767	£767		
Secondary IDACI C	£680	£704	£704	£690	£715	£715		
Secondary IDACI D	£620	£642	£642	£630	£653	£653		
Secondary IDACI E	£445	£460	£460	£450	£466	£466		
Secondary IDACI F	£335	£347	£347	£340	£352	£352		
Low Prior Attainment								
Primary LPA	£1,155	£1,195	£1,195	£1,170	£1,212	£1,212	£4,146,645	£4,621,470
Secondary LPA	£1,750	£1,811	£1,811	£1,775	£1,839	£1,839	£4,137,677	£4,317,947
English as an Additional Language								
Primary EAL	£580	£600	£600	£590	£611	£611	£601,097	£636,996
Secondary EAL	£1,565	£1,619	£1,619	£1,585	£1,642	£1,642	£331,285	£400,524
Mobility								
Primary Mobility	£945	£978	£978	£960	£995	£995	£79,131	£77,755
Secondary Mobility	£1,360	£1,407	£1,407	£1,380	£1,430	£1,430	£0	£0
School led funding								
Lump Sum								
Primary	£128,000	£132,454	£132,454	£134,400	£139,246	£139,246	£10,198,989	£10,721,978
Secondary	£128,000	£132,454	£132,454	£134,400	£139,246	£139,246		
Sparsity								
Primary	£56,300	£58,259	£48,015	£57,100	£59,159	£59,159	£742,348	£940,043
Secondary	£81,900	£84,750	£69,850	£83,000	£85,993	£85,993		
Premises								
Primary							£1,797,378	£1,799,164
Secondary								
Total Allocation (excluding minimum per pupil funding level and MFG funding total)							£127,082,139	£133,479,868
Additional funding to meet the minimum funding level							£293,032	£178,812
Total Allocation including minimum funding adj							£127,375,171	£133,658,680
MFG adjustment							£64,271	£25,021
Total funding for Schools Block Formula							£127,439,442	£133,683,700
Growth fund							£0	£0
Total funding for Schools Block Formula							£127,439,442	£133,683,700
Amount of block transfer							£0	£335,047
NNDR allocation							-£1,597,037	-£1,832,054
DSG Schools Block DfE allocation							£125,842,405	£132,186,693

4.6 The funding above is for 2024/25, but will change as follows:

- (1) The final funding allocation has yet to be announced but will reflect the October 2024 pupil numbers and the 2025/26 rates.

- (2) The final allocation will reflect pupil characteristics (such as deprivation and prior attainment) as at October 2023.
- (3) A block transfer may or may not be approved by the Schools Forum.
- (4) Growth and falling rolls funding will be added for 2025/26.

5. Sparsity

- 5.1 In 2024/25, West Berkshire Council moved to adopt the recommended NFF values for sparsity. It is therefore recommended that we continue to do so.

6. Block Transfers

- 6.1 Local authorities continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG, with schools forum approval. If approved, this would enable a transfer of in the region of £700k. These figures are estimates based on indicative NFF funding (October 2023 census pupil data).
- 6.2 Without schools forum agreement, or where they wish to transfer more than 0.5% of their schools block funding, local authorities must submit a disapplication request to the Secretary of State by 18th November 2024. Evidence of schools forum discussion and voting would need to be provided.
- 6.3 Setting a balanced budget for the High Needs Block continues to be a significant challenge; funding received for this block has seen increases not keeping pace with demand in terms of numbers of high needs pupils and unit costs of provision. This has resulted in an increasing deficit on the DSG as shown below:

Reserve Balances (surplus)/deficit	1.4.2023 Actual	Movement	1.4.2024 Actual	Forecast Movement	31.3.2025 Forecast
	£m	£m	£m	£m	£m
Schools Block	(1,355)	265	(1,090)	94	(996)
Early Years Block	1,052	209	1,261	(42)	1,219
Central School Services Block	39	(38)	1	13	13
High Needs Block	5,070	4,266	9,336	6,984	16,320
Grant changes	(45)	(13)	(58)	0	(58)
Total Deficit Balance	4,761	4,689	9,450	7,049	16,499

- 6.4 The DSG year-end position at the end of 2022/23 was a deficit of £4.8m and rose to £9.5m by 2023/24. The forecast deficit at the end of 2024/25 is £16.5m.
- 6.5 It is proposed that the HFG considers allocation of 0.5 % of the Schools Block (approx. £700,000) or 0.25% of the Schools Block (approx.£350,000).
- 6.6 Block transfers need to be approved annually. Transfers have previously been approved in 2020/21 0.25% (£263k), 2021/22 0.5% (£549k), 2022/23 0.25% (£300k) and 2024/25 0.25% £335k to support the High Needs Block. No transfer was approved in 2023/24.

7. Local Formula

7.1 West Berkshire Council replicates the NFF as far as possible, however, a decision needs to be taken locally on how to allocate any surplus or shortfall in the final funding allocation. There are a number of options for ensuring affordability, which effectively means deciding on a methodology for allocating any funding shortfall or surplus. The options are outlined below:

- (1) Amending the AWPU values. This would restrict the gains of all schools, although would result in additional MFG and MMPF to protect some schools.
- (2) Amending the MFG, within the allowable parameters. This does not generate much funding and impacts the lower funded schools the most.
- (3) Reducing the additional needs factors. This would impact those schools with pupils that require extra support. The DfE have directed more funding towards disadvantaged pupils so this would be contra to their aim.
- (4) Reducing the lump sum. This detrimentally affects small schools due to the amount of funding they are able to generate through pupil led factors.

7.2 Appendix Ai) shows:

- (1) The 2024/25 final allocations per school vs the 2023/24 NFF allocation.

7.3 Actual individual school allocations will be dependent on the October 2024 census and the 2025/26 funding rates.

8. Additional Funds outside the School Formula

8.1 School funding regulations allow a few exceptional circumstances to be funded outside the formula and be top sliced from the DSG. Criteria for allocating these need to be agreed.

- (a) Growth funding is within the Local Authorities' Schools Block DSG allocations. It may be set aside as a specific growth fund or distributed via the formula. The growth fund supports growth in pre-16 pupil numbers to meet basic need; supports additional classes needed to meet infant class size regulation; and meets the costs of new schools.
- (b) Funding for schools in financial difficulty where a school phase has agreed to de-delegate this funding (primary phase only in West Berkshire). There needs to be agreed criteria on how this funding is to be determined and allocated to schools. The Schools Forum agreed to cease this fund in 2022/23.
- (c) Funding can be used from the high needs block to allocate additional funding to schools which have a disproportionate number of high needs pupils. This has to be determined by a formulaic method.
- (d) Falling rolls funding is, from 2024/25, also within the Schools Block DSG allocations. A falling rolls fund may be set aside, and used where a school has surplus places and faces a funding shortfall but an increase in pupils in the near future is expected. In 2018/19 the Schools Forum agreed to cease the Falling Rolls fund.

For each fund the Schools' Forum need to agree clear criteria setting out the circumstances in which payments could be made and the basis for calculating the sum to be paid. These are included in Appendices B and C.

9. De-delegations, Education Functions and Health & Safety Service (maintained schools)

9.1 De-delegated services are for maintained schools only. Funding for these services must be allocated through the formula but can be passed back, or 'de-delegated' for maintained primary and secondary schools with schools forum approval. Academies may be given the option to buy into the service, as can Nursery schools, Special schools and PRUs. The de-delegations need to be re-determined on an annual basis.

9.2 The relevant Schools' Forum representatives for each phase will vote on whether each service is to be de-delegated or not. The services currently and proposed to be de-delegated are as follows:

Primary and Secondary only:

- Behaviour Support Services
- Ethnic Minority Support
- Trade Union Local Representation
- CLEAPSS

9.3 Education responsibilities held by local authorities for **all** schools are funded from the Central Schools Services Block of the DSG. Education functions held by local authorities for **maintained schools only**, can be funded from maintained schools budget shares and de-delegated, with agreement of the maintained schools members of schools forums.

All Maintained Schools:

- Statutory and Regulatory Duties comprising:
 - Statutory accounting functions in respect of schools
 - Internal Audit of schools
 - Administration of pensions for school staff

9.4 In order to meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation, a full schools health and safety service will be provided to all maintained schools. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.

Academies and other non-maintained schools may be able to choose to buy into the above services, subject to provider agreement.

9.5 Information about these services is reported to the Schools' Forum on an annual basis. The final decision on each service will be made by the relevant Schools' Forum Members for each phase by the end of January 2025. Schools may wish to contact their Schools' Forum representative direct to express their view, or respond as part of this consultation.

10. Consultation Proposals

1. Do you agree that, subject to final affordability, West Berkshire should mirror the DfE's 2025/26 NFF as closely as possible and that this formula should be used to calculate funding allocations? Yes/No

2. Do you agree that any shortfall or surplus in funding is addressed by adjusting the AWPU values? Yes/No

3. What percentage transfer of funding would you support from the Schools Block to the High Needs block? A) 0%, B) 0.25%, C) 0.5%.

4. Do you agree with the criteria set to access additional funds outside the school formula? Yes/No

5. Do you agree with the proposed De-delegated Services, Education Functions and Health and Safety service for all maintained schools? Yes/No

11. Timetable

11.1 The timetable for determining the school formula and schools budgets for 2025/26 is as follows:

Date	Who	Item
tbc 2024	DfE	Operational guidance published
tbc 2024	DfE	NFF illustrative allocations published and APT issued
Oct 2024	LA	Modelling of new primary & secondary school formula
02.10.24	HFG	Approve consultation proposals
14.10.24	SF	Approve consultation proposals
16.10.24 – 6.11.24	Schools	School funding formula consultation with schools.
19.11.24	HFG	Review school formula consultation responses and make recommendation to Schools' Forum.
02.12.24	SF	Review school formula consultation responses.
Mid Dec 2024	DfE	DSG funding allocations and APT containing census data for final formula issued
Mid Dec 2024	LA	Updating by officers of formula and the funding rates in light of actual DSG funding
08.01.25	HFG	Review final proposals and make recommendation to Schools' Forum.
20.01.25	SF	Review HFG recommendations, final calculations and final formula.
By xx.1.25	Political ratification	Approval of School Formula
xx.1.25	LA	Deadline for submission of final APT to ESFA
28.2.25	LA	Statutory deadline for providing primary and secondary maintained schools with funding allocation

12. Appendices

12.1 Appendix Ai) 1 - 2024/25 funding allocations (to be updated with 2025/26 figures)

12.2 Appendix B – Criteria for awarding Growth Funding

12.3 Appendix C – Criteria for allocating the Additional High Needs Fund

12.4 Appendix D – Equalities Impact Assessment

2024/25 School Formula Allocations

APPENDIX FINAL ALLOCATIONS 2024/25		2023/24 FINAL ALLOCATION (after 0% HNB transfer)			2024/25 FINAL ALLOCATION (after 0.25% HNB transfer)			YEAR ON YEAR CHANGE			
School Name	Phase	Pupil count Oct 2022	Formula allocated	Per pupil funding	Pupil count Oct 2023	Formula allocated	Per pupil funding	Increase in total cash	Change in pupils	Increase in per pupil total funding	% change
Aldermaston C.E. Primary School	Primary	120	£676,427	£5,637	103	£678,863	£6,591	£2,436	-17	£954	0%
Basildon C.E. Primary School	Primary	154	£744,845	£4,837	150	£764,729	£5,098	£19,884	-4	£262	3%
Beedon C.E. (Controlled) Primary School	Primary	44	£381,243	£8,665	35	£373,199	£10,663	£-8,044	-9	£1,998	-2%
Beenham Primary School	Primary	62	£485,322	£7,828	58	£482,743	£8,323	£-2,578	-4	£495	-1%
Birch Copse Primary School	Primary	423	£1,892,243	£4,473	414	£1,937,468	£4,680	£45,225	-9	£206	2%
Bradfield C.E. Primary School	Primary	142	£703,655	£4,955	148	£770,799	£5,208	£67,144	6	£253	10%
Brightwalton C.E. Aided Primary School	Primary	99	£553,940	£5,595	93	£560,736	£6,029	£6,796	-6	£434	1%
Brimpton C.E. Primary School	Primary	59	£434,777	£7,369	53	£443,554	£8,369	£8,777	-6	£1,000	2%
Bucklebury C.E. Primary School	Primary	122	£647,386	£5,306	107	£630,807	£5,895	£-16,578	-15	£589	-3%
Burghfield St Mary's C.E. Primary School	Primary	214	£1,005,648	£4,699	190	£962,434	£5,065	£-43,213	-24	£366	-4%
Calcot Infant School and Nursery	Primary	218	£1,117,402	£5,126	191	£1,035,507	£5,422	£-81,895	-27	£296	-7%
Calcot Junior School	Primary	281	£1,386,750	£4,935	273	£1,435,347	£5,258	£48,597	-8	£323	4%
Chaddleworth St Andrew's C.E. Primary School	Primary	23	£283,581	£12,330	27	£328,324	£12,160	£44,742	4	£-169	16%
Chieveley Primary School	Primary	191	£907,456	£4,751	177	£899,008	£5,079	£-8,448	-14	£328	-1%
Cold Ash St Mark's CE Primary School	Primary	187	£856,254	£4,579	195	£936,081	£4,800	£79,828	8	£222	9%
Compton C.E. Primary School	Primary	183	£911,574	£4,981	179	£945,922	£5,284	£34,348	-4	£303	4%
Curridge Primary School	Primary	93	£532,825	£5,729	82	£509,414	£6,212	£-23,411	-11	£483	-4%
Denefield School	Secondary	961	£5,789,777	£6,025	971	£6,195,305	£6,380	£405,528	10	£356	7%
Downsway Primary School	Primary	213	£977,621	£4,590	212	£1,025,198	£4,836	£47,578	-1	£246	5%
Enborne C.E. Primary School	Primary	77	£467,131	£6,067	75	£491,776	£6,557	£24,646	-2	£490	5%
Englefield C.E. Primary School	Primary	109	£549,194	£5,038	109	£575,273	£5,278	£26,079	0	£239	5%
Falkland Primary School	Primary	423	£1,891,219	£4,471	420	£1,964,104	£4,676	£72,885	-3	£205	4%
Fir Tree Primary School and Nursery	Primary	196	£1,031,245	£5,261	206	£1,149,166	£5,578	£117,921	10	£317	11%
Francis Baily Primary School	Primary	549	£2,433,454	£4,433	524	£2,477,611	£4,728	£44,157	-25	£296	2%
Garland Junior School	Primary	235	£1,170,142	£4,979	220	£1,163,795	£5,290	£-6,347	-15	£311	-1%
Hampstead Norreys C.E. Primary School	Primary	75	£501,854	£6,691	67	£512,736	£7,653	£10,882	-8	£961	2%
Hermitage Primary School	Primary	191	£899,815	£4,711	188	£938,454	£4,992	£38,639	-3	£281	4%
Highwood Copse Primary School	Primary	73.5	£452,647	£6,158	98.5	£574,925	£5,837	£122,277	25	£-322	27%
Hungerford Primary School	Primary	360	£1,696,512	£4,713	346	£1,772,871	£5,124	£76,359	-14	£411	5%
Inkpen Primary School	Primary	56	£436,665	£7,798	48	£421,658	£8,785	£-15,007	-8	£987	-3%
John O'gaunt School	Secondary	430	£2,908,003	£6,763	463	£3,254,136	£7,028	£346,133	33	£266	12%
John Rankin Infant and Nursery School	Primary	230	£1,096,459	£4,767	220	£1,128,644	£5,130	£32,185	-10	£363	3%
John Rankin Junior School	Primary	357	£1,608,436	£4,505	358	£1,679,949	£4,693	£71,513	1	£187	4%
Kennet School	Secondary	1517	£9,258,071	£6,103	1522	£9,831,511	£6,460	£573,440	5	£357	6%
Kennet Valley Primary School	Primary	201	£1,001,475	£4,982	194	£1,030,986	£5,314	£29,511	-7	£332	3%
Kintbury St Mary's C.E. Primary School	Primary	140	£746,936	£5,335	130	£760,292	£5,848	£13,356	-10	£513	2%
Lambourn CofE Primary School	Primary	157	£844,959	£5,382	149	£848,947	£5,698	£3,988	-8	£316	0%
Little Heath School	Secondary	1325	£8,144,727	£6,147	1312	£8,460,100	£6,448	£315,373	-13	£301	4%
Long Lane Primary School	Primary	214	£1,024,705	£4,788	209	£1,059,026	£5,067	£34,321	-5	£279	3%
Mortimer St John's C.E. Infant School	Primary	174	£843,232	£4,846	176	£885,448	£5,031	£42,216	2	£185	5%
Mortimer St Mary's C.E. Junior School	Primary	242	£1,099,976	£4,545	243	£1,145,899	£4,716	£45,922	1	£170	4%
Mrs Bland's Infant School	Primary	154	£860,215	£5,586	148	£861,122	£5,818	£907	-6	£233	0%
Pangbourne Primary School	Primary	174	£868,807	£4,993	164	£883,993	£5,390	£15,186	-10	£397	2%
Park House School	Secondary	975	£5,970,446	£6,124	912	£5,857,925	£6,423	£-112,521	-63	£300	-2%
Parsons Down Infant School	Primary	117	£640,728	£5,476	90	£548,861	£6,098	£-91,867	-27	£622	-14%
Parsons Down Junior School	Primary	179	£894,024	£4,995	184	£976,161	£5,305	£82,137	5	£311	9%
Purley CofE Primary School	Primary	98	£548,894	£5,601	93	£565,863	£6,085	£16,969	-5	£484	3%
Robert Sandilands Primary School and Nursery	Primary	212	£1,063,208	£5,015	213	£1,115,313	£5,236	£52,105	1	£221	5%
Shaw-cum-Donnington C.E. Primary School	Primary	93	£541,841	£5,826	95	£587,512	£6,184	£45,671	2	£358	8%
Shefford C.E. Primary School	Primary	56	£417,993	£7,464	52	£417,400	£8,027	£-593	-4	£563	0%
Speenhamland School	Primary	276	£1,348,299	£4,885	286	£1,462,786	£5,115	£114,487	10	£229	8%
Springfield Primary School	Primary	309	£1,408,217	£4,557	304	£1,463,122	£4,813	£54,904	-5	£256	4%
Spurcroft Primary School	Primary	398	£1,840,337	£4,624	382	£1,841,150	£4,820	£813	-16	£196	0%
St Bartholomew's School	Secondary	1353	£7,854,034	£5,805	1354	£8,395,759	£6,201	£541,725	1	£396	7%
St Finian's Catholic Primary School	Primary	196	£895,697	£4,570	201	£960,876	£4,780	£65,179	5	£211	7%
St John the Evangelist C.E. Nursery and Infant Sch	Primary	180	£887,667	£4,931	179	£936,656	£5,233	£48,989	-1	£301	6%
St Joseph's Catholic Primary School	Primary	213	£1,046,400	£4,913	213	£1,106,255	£5,194	£59,856	0	£281	6%
St Nicolas C.E. Junior School	Primary	251	£1,127,023	£4,490	258	£1,235,423	£4,788	£108,400	7	£298	10%
St Paul's Catholic Primary School	Primary	304	£1,374,123	£4,520	298	£1,416,337	£4,753	£42,214	-6	£233	3%
Stockcross C.E. School	Primary	90	£524,376	£5,826	73	£499,252	£6,839	£-25,124	-17	£1,013	-5%
Streatley C.E. Voluntary Controlled School	Primary	99	£530,318	£5,357	99	£562,495	£5,682	£32,178	0	£325	6%
Sulhamstead and Ufton Nerve School	Primary	102	£556,633	£5,457	99	£584,194	£5,901	£27,560	-3	£444	5%
Thatcham Park CofE Primary	Primary	337	£1,577,042	£4,680	320	£1,581,182	£4,941	£4,140	-17	£262	0%
The Downs School	Secondary	1047	£6,118,444	£5,844	1046	£6,404,391	£6,123	£285,947	-1	£279	5%
The Ilsleys Primary School	Primary	60	£418,719	£6,979	53	£414,979	£7,830	£-3,740	-7	£851	-1%
The Willink School	Secondary	1026	£6,305,557	£6,146	1016	£6,550,610	£6,447	£245,052	-10	£302	4%
The Willows Primary School	Primary	348	£1,790,551	£5,145	349	£1,895,491	£5,431	£104,940	1	£286	6%
The Wincombe School	Primary	441	£2,050,804	£4,650	425	£2,085,649	£4,907	£34,846	-16	£257	2%
Theale C.E. Primary School	Primary	318	£1,461,539	£4,596	314	£1,522,849	£4,850	£61,310	-4	£254	4%
Theale Green School	Secondary	634	£4,075,274	£6,428	699	£4,658,693	£6,665	£583,419	65	£237	14%
Trinity School	Secondary	1085	£6,762,439	£6,233	1145	£7,538,958	£6,584	£776,520	60	£352	11%
Welford and Wickham C.E. Primary School	Primary	72	£472,080	£6,557	66	£489,494	£7,417	£17,414	-6	£860	4%
Westwood Farm Infant School	Primary	179	£870,286	£4,862	186	£952,740	£5,122	£82,454	7	£260	9%
Westwood Farm Junior School	Primary	233	£1,110,438	£4,766	238	£1,183,972	£4,975	£73,534	5	£209	7%
Whitelands Park Primary School	Primary	393	£1,758,282	£4,474	392	£1,920,240	£4,899	£161,958	-1	£425	9%
Woolhampton C.E. Primary School	Primary	100	£553,131	£5,531	100	£599,347	£5,993	£46,217	0	£462	8%
Yattendon C.E. Primary School	Primary	90	£519,994	£5,778	94	£563,900	£5,999	£43,907	4	£221	8%
Total formula funding			£127,439,442			£133,683,700		£6,244,258			
Block Transfer			£0			£335,047					
Total allocation			£127,439,442			£134,018,747					
Primary Total			£64,252,670			£66,536,312		£2,283,642			
Secondary Total		23313	£63,186,772		23076	£67,147,388		£3,960,616	-237		

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Appendix B

West Berkshire Council Schools Growth Fund Criteria 2025/26

1. Background

- 1.1 Growth funding allocated through the national funding formula (NFF) within each local authority's Schools Block.
- 1.2 The methodology to calculate growth funding was introduced in 2019/20 and has remained the same for the 2025/26 financial year. This means it will be based on the observed differences between the number on roll in each local authority between the October 2023 and October 2024 school censuses.
- 1.3 Growth is measured at middle layer super output area (MSOA) level to detect 'pockets' of growth, counting the increase in pupil numbers in each MSOA in West Berkshire between the two most recent October censuses.
- 1.4 The growth factor will be allocated at £1,550 per new primary pupil, £2,320 for each new secondary pupil plus a lump sum of £76,195 for each new school that opened in the previous year. The growth factor in the national funding formula is a proxy for overall growth costs at a local authority level. There is no expectation for local authorities to use these rates in their local arrangements for funding growth nor that spending on growth will match the sum allocated.
- 1.5 As growth funding is within the schools block, a movement of funding between the schools formula and the growth fund is not treated as a transfer between blocks. If funding is not required for growth, it can be added into the school formula, but if there is a shortfall, this needs to be met from a top slice of the main schools' block allocation. The amount of growth fund is subject to Schools Forum approval.
- 1.6 Local authorities must produce criteria for allocating growth funding, to be agreed by the Schools Forum. The criteria should contain clear objective trigger points for qualification and a clear formula for calculating allocations with these criteria applying to all schools on the same basis. This will be checked by ESFA for compliance with the annually made School and Early Years Finance (England) Regulations, to check that it provides a transparent and consistent basis for the allocation of funding, which may be different for each phase.
- 1.7 Any unspent growth funding remaining at the year-end should be reported to the Schools Forum. Funding may be carried forward to the following funding period, as with any other centrally retained budget, and can choose to use it specifically for growth if the authority wishes. Any over spent growth funding will form part of the overall DSG surplus or deficit balance.

2. Purpose

- 2.1 The growth fund is for the benefit of maintained and academy primary and secondary schools, supporting growth in pre-16 pupil numbers to meet basic need.

Special schools and resourced provisions are funded under the 'place-plus' approach and nursery schools are funded based on participation levels.

2.2 The growth fund may only be used to:

- support where a school or academy has agreed with the local authority to provide an extra class in order to meet basic need in the area (either as a bulge class or as an ongoing commitment). This is a mandatory requirement and there is also a mandatory minimum funding calculation
- Support growth in pre-16 pupil numbers to meet basic need e.g., support a school who has agreed with the authority to provide an extra class in order to meet basic need (either as a bulge class or as an ongoing commitment)
- Support where a school has temporarily increased its pupil admission numbers (PAN), by a minimum number of pupils, in agreement with the authority
- Support for KS1 classes where overall pupil numbers exceed a multiple of 30, by a minimum number of pupils
- pre-opening costs, initial equipping allowance, or diseconomy of scale allowance, for new maintained schools and academies

2.3 The growth fund is not to be used to support schools in financial difficulty, general growth due to popularity or schools growing back to their planned admission number (PAN) following a period of low recruitment.

3. **Growth Fund Criteria**

3.1 Support for schools that are providing additional capacity to meet basic need avoids schools being at a financial disadvantage until the increased pupil numbers are reflected in their budgets. A school would normally be asked to run an additional class as a result of an increased September intake, the funding for those additional pupils is not reflected in the funding until the following year.

- For maintained schools, there is a funding lag period of 7 months, between September and March
- Academies' FY runs from September to August, therefore, academies receive a full 12 months of growth funding. This is paid in two separate payments: 7/12ths of the annual amount (to cover the period Sept – March). The other 5/12ths is paid in April (to cover the period April to August). This additional 5/12ths element for academies is then reimbursed to the LA's Dedicated School's Grant by the ESFA

3.2 Schools will be invited to apply for the growth fund late in the autumn term, following confirmation of the October census figures, if they meet one of the criteria. In exceptional circumstances, a school may apply at a different point in the year.

Additional Class Funding Primary

3.3 This is payable where a school has agreed with the authority to provide an extra class in order to meet basic need in the area (either as a bulge class or as an ongoing commitment).

- 3.4 Funding will be £74,500 (equivalent to 20 pupils x basic needs entitlement including ACA). The funding amount provided should be sufficient to cover the cost of a TMS6 teacher with on-costs, one TA, plus other costs.
- 3.5 Maintained primary schools will receive funding for the period September to March (7/12ths equivalent to £43,460)
- 3.6 The number of years this funding will be paid will depend on whether the growth is permanent or temporary. For example, an infant school that changes from a 2 form entry to a 3 form entry from September 2025 will typically receive growth funding in 2025/26, 2026/27 and 2027/28.

Secondary Schools Funding

- 3.7 This is payable where a school has *agreed with the authority to take an increased September in-take to meet basic need in the area.*
- 3.8 The staffing structure of secondary schools differs significantly to that of primary schools, the link between pupil numbers and the requirement for additional classes/teachers is less clear. It might be possible for schools to accommodate pupils within the existing curriculum model, without the need for an additional teacher.
- 3.9 Funding will only be provided for permanent growth and will be reviewed on a case-by-case basis. This is to ensure the increase in pupil numbers directly contributes to increased costs of admitting additional pupils e.g., curriculum structure, additional pastoral or support staff. The eligibility for funding will be assessed for each year of permanent growth.
- 3.10 Funding up to £110,450 will be available for academies. Applying the same formula as for primaries, this is based on 20 pupils x average basic needs entitlement including ACA.
- 3.11 Eligible maintained secondaries will receive funding up to £64,430 to cover the period from September to March.

KS1 Classes (infant class size)

- 3.12 This is payable to a school with infant classes which is required to set up an additional class as required by infant class size regulations, and the school cannot accommodate all its additional reception and Key Stage 1 pupils in classes of 30 or less i.e. the total number of pupils in the 3 year groups exceeds a multiple of 30. (see Appendix A for examples).
- 3.13 In order to qualify for the additional funding, the school must have set up an additional class and employed an additional teacher, and must not have exceeded its admission number unless requested to by the LA.
- 3.14 Funding will be £74,500 for each new class, pro rata for maintained schools for the remainder of the financial year. The funding provided should be sufficient to cover the cost of a TMS6 teacher with on-costs, one TA, plus other costs.
- 3.15 Before setting up an additional class and employing an additional teacher, schools should be aware that this additional in-year payment is temporary one-off funding for the remainder of the financial year in order to meet the pupil's basic need until full per pupil funding is received the following April (September for an academy). Schools will be required to meet the costs of the additional class from their formula

pupil funding and lump sum from the following year. Schools accessing the infant class size funding where pupil numbers are just 2 or 3 above the limit, should carefully consider the longer-term financial implications of employing an additional teacher.

New School

- 3.16 **Start-up funding pre-opening** costs payable to a new school such as for the Headteacher and other staffing and recruitment costs prior to opening and initial equipping allowance where the school is opening in response to basic need in the area.
- 3.17 Funding will be actual cost of staff appointed and in post prior to the opening of the new school up to a maximum of £76,195.
- 3.18 **Post opening funding - diseconomies of scale.** The total pupil numbers required by the new school to ensure viability will be agreed in advance with the school on an annual basis whilst the school is growing to full capacity and funding paid via the school formula will be based on this number. This will be reviewed on an annual basis and the estimates adjusted to take into account the actual pupil numbers in the previous funding period. Funding protection will be paid to the school based on the difference between the agreed pupil numbers and the actual pupil numbers for 3 full years.
4. **Applications for funding**
- 4.1 Schools will be invited to make an application for funding in the autumn term. Funding requests from schools are to be submitted to WBC Schools' Accountancy. In exceptional circumstances, a school may apply at a different point in the year.
- 4.2 The Head, or Acting Head, of Education Services, if satisfied that the criteria are met, will recommend approval to the Schools' Forum.
- 4.3 Funding for Sept – March will be paid following Schools' Forum approval. The other 5/12ths for academies is paid in April (to cover the period April to August).

Examples of Infant Class Size Additional In-Year Funding

Example 1

	October 2023 Census	October 2024 Census
Reception Pupil Numbers	23	31
Year 1 Pupil Numbers	20	25
Year 2 Pupil Numbers	22	20
Total Pupil Numbers	65	76
Number of Classes run by school	3	3

Although pupil numbers have increased by 11, and the reception class exceeds 30, under infant class size regulations the school is still only required to run 3 classes, therefore no additional in-year funding will be payable. Total pupil numbers would need to exceed 90 to trigger the requirement for a 4th class.

Example 2

	October 2023 Census	October 2024 Census
Reception Pupil Numbers	20	21
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	20
Total Pupil Numbers	59	61
Number of Classes run by school	3	3

Total pupil numbers have increased by 2 taking the total over 60 and requiring 3 classes. However, the school is already running and funding 3 classes within their existing budget, so no additional in-year funding will be payable – their budget requirement for the year has not changed by the admission of these 2 pupils.

Example 3

	October 2023 Census	October 2024 Census
Reception Pupil Numbers	20	21
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	20
Total Pupil Numbers	59	61
Number of Classes run by school	2	3

Same pupil numbers as the above example, except the school were operating with 2 classes. The school is therefore eligible for additional in-year funding if they operate a third class. However, if their budget with just 2 extra pupils would not sustain the cost of an additional teacher beyond the following April, then they would need to carefully consider the implications of accepting an additional pupil taking them over 60 (unless exceptions to the regulations apply, such as pupils with a statement of SEN naming the school or pupils moving into the area outside the normal admission round).

Example 4

	October 2023 Census	October 2024 Census
Reception Pupil Numbers	20	30
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	21
Total Pupil Numbers	59	71
Number of Classes run by school	2	3

The school were running and funding 2 classes before the September admissions took them over 60 pupils. Additional in-year funding would therefore be payable for the additional class, and the additional 12 pupils will generate enough funding to sustain the cost of the additional teacher from April 2025.

Appendix C

West Berkshire Council Schools

Additional High Needs Fund Criteria 2025/26

1. Background

- 1.1 Local authorities can provide additional targeted support to individual schools (maintained and academies) from its high needs block where it would be unreasonable to expect the first £6,000 of support for that schools high needs pupils to be met by them from its (pre 16) formula funding due to an exceptional number of such pupils on its roll.
- 1.2 The guidance from the DfE has stated that the additional funding paid to schools should be formulaic based on the number of high needs pupils in each school. It cannot take into account lower level needs of pupils. The formula or criteria should be as clear and simple as possible, and should be devised so that additional funds are targeted only to a minority of schools which have particular difficulties because of their **disproportionate number** of high needs pupils or their characteristics.
- 1.3 The Schools' Forum agreed methodology is set out below.

2. Methodology and Process

- 2.1 There will be an additional payment to schools where the actual number of pre 16 high needs pupils (i.e. pupils in mainstream receiving top ups) is significantly (1%) above the average of all schools in West Berkshire.
- 2.2 Where the actual number of pre 16 high needs pupils per school is 1% above the West Berkshire average (the average will be calculated using the number of high needs pupils in January 2025 and shown in the pink column on the attachment), each additional high needs pupil will attract £6,000 in addition to the top up. The number of additional pupils will be calculated on a proportionate basis rather than rounding up or down to whole pupil numbers to avoid a funding cliff-edge.
- 2.3 The funding will be paid pro rata each term based on the actual number of pre 16 pupils receiving top ups at that time for the number of days in that term i.e. calculated and paid in April, October and January.
- 2.4 The attached table shows for each school how many high needs pupils equals the average + 1% (the pink column) before qualifying for additional funding in 2025/26. Schools will receive £6,000 per 1.0 high needs pupils they have on roll *above this average number*. Note that funding may be a proportion of £6,000 if the calculation is less than 1.0.
- 2.5 The amount of funding to be set aside for this purpose in the high needs budget will be £200,000.

Additional SEN Funding for Schools with Disproportionate large numbers of High Needs Pupils

Cost Centre	SCHOOL	Relevant Data			Indicative Funding		
		Total Pre 16 Pupil No.s (Oct 2023 Census) less RU Pupils	Mainstream Pre 16 Pupil No.s Receiving Top Ups January 2024	Notional SEN Budget 2024/25	Average No. of Pupils Formula Funded	High Needs Pupils Above Average (unrounded)	Indicative Add'l Funding
	Primary				3.40%	1% above LA avg	£6,000
	Secondary				2.83%	1% above LA avg	
91000	Aldermaston C.E. Primary School	103	3	44,539	3.50	0.00	0
91100	Basildon C.E. Primary School	150	4	42,978	5.10	0.00	0
91300	Beedon C.E. (Controlled) Primary School	35	2	21,516	1.19	0.81	4,857
91400	Beenham Primary School	58	1	20,197	1.97	0.00	0
91200	Birch Copse Primary School	414	3	95,135	14.08	0.00	0
91500	Bradfield C.E. Primary School	148	6	53,943	5.03	0.97	5,796
91600	Brightwalton C.E. Aided Primary School	93	0	22,406	3.16	0.00	0
91700	Brimpton C.E. Primary School	53	0	30,048	1.80	0.00	0
91800	Bucklebury C.E. Primary School	107	4	35,707	3.64	0.36	2,163
91900	Burghfield St Mary's C.E. Primary School	190	3	74,334	6.46	0.00	0
92000	Calcot Infant School and Nursery	191	5	79,335	6.50	0.00	0
92100	Calcot Junior School	273	5	112,675	9.29	0.00	0
95222	Chaddleworth St Andrew's C.E. Primary School	27	0	12,001	0.92	0.00	0
92400	Chieveley Primary School	177	3	55,506	6.02	0.00	0
95900	Cold Ash St Mark's CE Primary School	195	3	49,563	6.63	0.00	0
92200	Compton C.E. Primary School	179	6	57,977	6.09	0.00	0
92300	Curridge Primary School	82	0	27,526	2.79	0.00	0
92500	Downsway Primary School	212	11	63,929	7.21	3.79	22,735
92800	Enborne C.E. Primary School	75	0	10,039	2.55	0.00	0
92900	Englefield C.E. Primary School	109	2	17,407	3.71	0.00	0
93000	Falkland Primary School	420	5	135,603	14.29	0.00	0
93100	Fir Tree Primary School and Nursery	206	5	93,051	7.01	0.00	0
93200	Francis Baily Primary School	524	12	255,794	17.82	0.00	0
93400	Garland Junior School	220	4	65,546	7.48	0.00	0
93500	Hampstead Norreys C.E. Primary School	67	2	24,946	2.28	0.00	0
93600	Hermitage Primary School	188	7	52,178	6.39	0.61	3,633
	Highwood Copse Primary School	81	2	11,056	2.76	0.00	0
93700	Hungerford Primary School	346	10	173,610	11.77	0.00	0
92700	The Islesys Primary School	53	1	12,492	1.80	0.00	0
93800	Inkpen Primary School	48	3	26,023	1.63	1.37	8,204
93922	John Rankin Infant and Nursery School	220	9	103,169	7.48	1.52	9,102
94000	John Rankin Junior School	358	3	94,955	12.18	0.00	0
94100	Kennet Valley Primary School	194	6	76,039	6.60	0.00	0
94200	Kinbury St Mary's C.E. Primary School	130	9	57,206	4.42	4.58	27,470
94300	Lambourn CofE Primary School	149	3	75,982	5.07	0.00	0
94400	Long Lane Primary School	209	5	98,157	7.11	0.00	0
97522	Mortimer St. John's C.E. Infant School	176	2	52,881	5.99	0.00	0
97522	Mortimer St Mary's C.E. Junior School	243	8	76,683	8.27	0.00	0
94500	Mrs Bland's Infant School	148	6	63,199	5.03	0.97	5,796
94600	Pangbourne Primary School	164	1	60,541	5.58	0.00	0
94822	Parsons Down Partnership	274	13	105,651	9.32	3.68	22,082
94900	Purley CofE Primary School	93	1	47,124	3.16	0.00	0
95000	Robert Sandilands Primary School and Nursery	213	3	72,136	7.24	0.00	0
95100	Shaw-cum-Donnington C.E. Primary School	95	1	50,466	3.23	0.00	0
95200	Shefford C.E. Primary School	52	1	16,009	1.77	0.00	0
95300	Speenhamland School	286	16	124,515	9.73	6.27	37,633
95400	Springfield Primary School	304	8	104,566	10.34	0.00	0
95500	Spurcroft Primary School	382	7	146,788	12.99	0.00	0
95700	St Finian's Catholic Primary School	201	4	64,153	6.84	0.00	0
97700	St John the Evangelist CofE Infant and Nursery School	179	2	67,207	6.09	0.00	0
97800	St Joseph's Catholic Primary School	213	3	84,172	7.24	0.00	0
96200	St Nicolas C.E. Junior School	258	5	61,010	8.78	0.00	0
96100	St Paul's Catholic Primary School	298	3	109,857	10.14	0.00	0
96322	Stockcross C.E. School	73	1	19,121	2.48	0.00	0
96400	Streatley C.E. Voluntary Controlled School	99	1	30,002	3.37	0.00	0
96500	Sulhamstead and Ufton Nerve School	99	2	42,137	3.37	0.00	0
99700	Thatcham Park CofE Primary	320	13	101,157	10.88	2.12	12,694
96600	Theale C.E. Primary School	314	9	59,582	10.68	0.00	0
96322	Welford and Wickham C.E. Primary School	66	4	18,789	2.24	1.76	10,531
96800	Westwood Farm Infant School	186	5	64,965	6.33	0.00	0
96900	Westwood Farm Junior School	238	4	71,651	8.10	0.00	0
97000	Whitelands Park Primary School	392	9	175,623	13.33	0.00	0
98700	The Willows Primary School	349	10	195,940	11.87	0.00	0
99400	The Winchcombe School	425	9	191,477	14.46	0.00	0
97300	Woolhampton C.E. Primary School	100	2	35,416	3.40	0.00	0
97400	Yattendon C.E. Primary School	94	3	26,085	3.20	0.00	0
98900	Denefield School	971	11	397,762	27.47	0.00	0
98800	The Downs School	1,046	16	346,950	29.60	0.00	0
99000	John Ogaunt School	463	16	287,796	13.10	2.90	17,396
99100	Kennet School	1,522	39	708,844	43.07	0.00	0
99200	Little Heath School	1,312	8	496,752	37.12	0.00	0
99300	Park House School	912	7	362,364	25.81	0.00	0
99800	St Bartholomew's School	1,354	28	467,394	38.31	0.00	0
99500	Theale Green School	699	17	292,356	19.78	0.00	0
99900	Trinity School	1,145	23	584,474	32.40	0.00	0
99600	The Willink School	1,016	26	373,256	28.75	0.00	0
	PRIMARY TOTAL	12,618	303		429	29	172,698
	SECONDARY TOTAL	10,440	191		295	3	17,396
	TOTAL ALL SCHOOLS	23,058	494		725	32	190,094

Appendix D

Equality Impact Assessment (EqIA) - Stage One

What is the proposed decision that you are asking the Schools' Forum to make:	Approve the funding formula 25/26
Name of Service/Directorate:	Finance/Resources
Name of assessor:	Melanie Ellis
Date of assessment:	25.9.24

Is this a ?		Is this policy, strategy, function or service ... ?	
Policy	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	New or proposed	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Strategy	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Already exists and is being reviewed	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Function	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Is changing	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Service	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		

(1) What are the main aims, objectives and intended outcomes of the proposed decision and who is likely to benefit from it?	
Aims:	To approve the funding formula 25/26
Objectives:	
Outcomes:	
Benefits:	

(2) Which groups might be affected and how? Is it positively or negatively and what sources of information have been used to determine this?		
Group Affected	What might be the effect?	Information to support this
Age		
Disability		
Gender Reassignment		
Marriage and Civil Partnership		
Pregnancy and Maternity		

Race		
Religion or Belief		
Sex		
Sexual Orientation		
Further Comments:		
No impact		

(3) Result	
Are there any aspects of the proposed decision, including how it is delivered or accessed, that could contribute to inequality?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	
Will the proposed decision have an adverse impact upon the lives of people, including employees and service users?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	

(4) Identify next steps as appropriate:	
EqlA Stage 2 required	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Owner of EqlA Stage Two:	
Timescale for EqlA Stage Two:	

Name: Melanie Ellis

Date: 25th September 2024

De-delegation, Education Functions and Health and Safety Service Proposals 2025/26

Report being considered by: Schools Forum on 14th October 2024

Report Author: Lisa Potts

Item for: Decision **By:** All Maintained School Representatives

1. Purpose of the Report

1.1 This report sets out the details, cost, and charges to schools of the services on which maintained school representatives are required to vote (on an annual basis).

2. Recommendations

2.1 Maintained primary, secondary, special, nursery and PRU heads (as applicable) to agree the De-delegations and Education Functions as set out in Table 7.

2.2 Maintained primary, secondary, special, nursery and PRU heads (as applicable) to agree the Health and Safety Service as set out in Table 8.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?

Yes:

No:

3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
	A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		X	

B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		
Data Impact:		X		
Consultation and Engagement:				

4. Introduction/Background

- 4.1 This report sets out the details, cost, and charges to schools of the services on which maintained school representatives are required to vote (on an annual basis).
- 4.2 De-delegated services consist of Behaviour Support, Ethnic Minority Support, Trade Union Local Representation, Consortium of Local Education Authorities for the Provision of Science Services (CLEAPSS) and School Improvement
- 4.3 Education functions consist of the statutory and regulatory duties held by the local authority in respect of maintained schools.
- 4.4 The Health and Safety service provides a compliance, advice and training role for schools.

5. Supporting Information on De-delegated services

- 5.1 De-delegated services are for maintained schools only. Funding must be allocated through the formula but can be passed back, or de-delegated for maintained primary and secondary schools with schools forum approval.
- 5.2 Funds cannot be de-delegated from Special and Nursery Schools and PRUs for these services, but those schools will have the option to buy back these services at a cost based on the same amount per pupil as for primary and secondary schools. Academies may also be given the option to buy into the service.
- 5.3 The schools funding regulations for 2025/26 have not yet been published, but we have assumed similar arrangements for de-delegation of the cost of these services will apply for 2025/26.
- 5.4 Primary and secondary school representatives are required to recommend to Schools Forum on whether each service is to be de-delegated or not. The services below were de-delegated in 2024/25 and are proposed to be de-delegated in 2025/26:

Primary and Secondary only:

- Behaviour Support Services
- Ethnic Minority Support
- Trade Union Local Representation

- CLEAPSS
- School Improvement

6. Therapeutic Thinking Service

- 6.1 The Therapeutic Thinking Service proposal for 2025/26 is set out in Appendix B.
- 6.2 Table 1 shows the budget and unit charge for 2025/26 compared to 2024/25. The total cost will be divided by the total numbers of pupils in the October 2024 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. As all schools will have access to all aspects of the service, the same unit charge will apply to both primary and secondary schools. Based on the October 2023 census this is estimated to be £18.79 per pupil but the final rate will be determined according to the October 2024 census.

TABLE 1	2024/25			2025/26		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	10,980	£18.21	£199,911	10,980	£18.79	£206,314
Maintained Secondary Schools	3,378	£18.21	£61,503	3,378	£18.79	£63,472
Total			£261,414			£269,786

7. Ethnic Minority and Traveller Achievement Service

- 7.1 The detail of the Ethnic Minority and Traveller Achievement Service (EMTAS) is set out in Appendix C.
- 7.2 Table 2 shows the budget and the unit charge for the service for 2025/26 compared to 2024/25. The total cost in respect of Primary and Secondary schools will be divided by the total number of pupils in the October 2024 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. As all schools will have access to all aspects of the service, the same unit charge will apply to both primary and secondary schools. Based on the October 2023 census this is estimated to be £11.17 per pupil but the final rate will be determined according to the October 2024 census.

TABLE 2	2024/25			2025/26		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	10,980	£12.97	£142,370	10,980	£11.17	£122,667
Maintained Secondary Schools	3,378	£12.97	£43,800	3,378	£11.17	£37,738
			£186,170			£160,405

8. Trade Union Representation

- 8.1 The detail of the service provided by Trade Union representatives to schools is set out in Appendix D.

- 8.2 Table 3 shows the budget and unit charge for the service for 2025/26 compared to 2024/25. The proposal for 2025/26 is based on the cost of 1FTE supply teacher on UPS3. The total net cost in respect of primary and secondary schools will be divided by the total number of pupils in the October 2024 census to determine a unit charge per pupil on which the de-delegated amount per school will be based on. As all schools have access to all representatives (regardless of which school they are based in), the same unit charge will apply to both primary and secondary schools. Based on the October 2023 census the charge will be £5.10 per pupil.

TABLE 3	2024/25			2025/26		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	10,980	£4.74	£52,076	10,980	£5.10	£56,018
Maintained Secondary Schools	3,378	£4.74	£16,021	3,378	£5.10	£17,234
			£68,097			£73,252

9. Consortium of Local Education Authorities for the Provision of Science Services (CLEAPSS)

- 9.1 The detail of the service provided by this subscription is set out in Appendix E.
- 9.2 As the actual pricing from CLEAPSS will not be available until after the schools budget has been set, an assumption has been made on the 2025/26 fee. Any over or under spend will be recovered the following year, as in all de-delegated services. Table 4 shows the budget and unit charge for the service for 2025/26 compared to 2024/25. The unit charge includes the administration fee. Note that secondary schools will need to pay the fee relating to sixth form pupils separately as de-delegation is based on pre 16 pupils only.

TABLE 4	2024/25				2025/26			
	Number of pupils	Unit Charge per pupil	Charge per school	Budget	Number of pupils	Est Unit Charge per pupil	Est Charge per school	Estimated Budget
Maintained Primary Schools	10,980	£0.19		£2,086	10,980	£0.19		£2,086
Maintained Secondary Schools	3,378	£0.19	£250	£1,392	3,378	£0.19	£250	£1,392
				£3,478				£3,478

10. School Improvement Team

- 10.1 The detail of the service provided by the School Improvement Team is set out in Appendix F.
- 10.2 Table 5 shows the budget and unit charge for the service for 2025/26 compared to 2024/25. The total cost will be divided by the total numbers of pupils in the October 2024 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. As all schools will have access to all aspects of the service, the same unit charge will apply to both primary and secondary schools. Based on the October 2023 census the charge will be £21.61 per pupil.

TABLE 5	2024/25			2025/26		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	10,980	£20.29	£222,829	10,980	£21.61	£237,275
Maintained Secondary Schools	3,378	£20.29	£68,554	3,378	£21.61	£72,998
			£291,383			£310,273

11. Education Functions for Maintained Schools

- 11.1 Education responsibilities held by local authorities for **all** schools are funded from the Central Schools Services Block of the DSG. Education functions held by local authorities for **maintained schools only** can be funded from maintained schools budget shares and de-delegated, with agreement of the maintained schools members of schools forums.
- 11.2 Education functions consist of the statutory and regulatory duties held by the local authority in respect of maintained schools. These consist of Accountancy, Internal Audit and Pension scheme administration. The Accountancy, audit and pension administration services are described in appendix G.
- 11.3 Representatives of all maintained schools (including Special and Nursery Schools and PRUs) are required to recommend to Schools Forum whether or not these services should be funded from maintained school budget shares and de-delegated for 2024/25:
- All Maintained Schools:**
- Statutory and Regulatory Duties comprising:
 - Statutory accounting functions in respect of schools
 - Internal Audit of schools
 - Administration of pensions for school staff
- 11.4 Academies and other non-maintained schools also may be able to choose to buy into any of the above services subject to service provider agreement.
- 11.5 Table 6 shows the budget and estimated unit charges for these services in 2025/26 compared to 2024/25. The total cost will be divided by the total numbers of pupils in the October 2024 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. The same unit charges will apply to both primary and secondary schools. Based on the October 2023 census the charge will be £10.15 per pupil.

TABLE 6	2024/25		2025/26				
	Charge per Pupil	Budget	Unit Charge per pupil	Total Budget	Primary Budget	Secondary Budget	Budget for Nursery, Special Schools and PRUs
Accountancy	£3.68	£54,607	£3.81	£56,571	£41,823	£12,867	£1,882
Audit	£3.55	£52,781	£3.60	£53,405	£39,482	£12,147	£1,776
Pension Scheme Administration	£2.61	£38,797	£2.74	£40,766	£30,138	£9,272	£1,356
Total Education Functions	£9.84	£146,185	£10.15	£150,742	£111,443	£34,285	£5,014

Table 7 summarises the de-delegations and education functions which are proposed for 2025/26:

TABLE 7	2025/26 Primary Budget £	Agreed by HFG	2025/26 Secondary Budget £	Agreed by HFG	2025/26 Early Years & High Needs Budgets £	Agreed by HFG
Therapeutic Thinking Support	£206,314	Yes	£63,472	Yes	n/a	n/a
Ethnic Minority Support	£122,667	Yes	£37,738	Yes	n/a	n/a
Trade Union Representation	£56,018	Yes	£17,234	Yes	£2,520	n/a
CLEAPSS	£2,086	Yes	£1,392	Yes	£80	n/a
School Improvement	£237,275	Yes	£72,998	Yes	n/a	n/a
Education Functions	£111,443	Yes	£34,285	Yes	£5,014	Yes

12. Health and Safety Service to Schools

- 12.1 As the Council is the employer and therefore the principal legal duty holder (notwithstanding any delegated responsibilities to a schools, Head Teachers and Governors) in relation to health and safety, it makes sense to ensure an adequate, effective and efficient health and safety service is provided to all Local Authority maintained schools and a buy-back option offered to non-maintained schools.
- 12.2 The Health and Safety Team provide a compliance, advice and training role for schools and the Team continue to be heavily involved in assisting schools developing and reviewing covid secure arrangements, plans and risk assessments.
- 12.3 Following a decision to change the way the service operated in 2020/21, for the last year all maintained schools have had the Level Two (Enhanced) service. This is a comprehensive health and safety support service and covers all aspects of health and safety management and support including necessary health and safety training.
- 12.4 It is proposed to provide the full schools health and safety service to all maintained schools, continuing on from the previous year. This will meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation.

- 12.5 Schools will pay a graduated fee based on pupil numbers for the Level 1 element of the service and a top up cost to cover the combined service. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.
- 12.6 A buy-back option would continue to be offered to schools such as academy and independent schools. Income generated from buy-back services would be invested in the service or offset to reduce costs for the schools in the collective agreement.
- 12.7 Table 8 below shows the 2025/26 cost if all Local Authority maintained schools, Voluntary Controlled, Voluntary Aided and special schools agree to one equal service.

Table 8

Pupil No's	Band A 0-60	Band B 61 - 100	Band C 101-200	Band D 201-300	Band E 301- 465	Band F +466	Band G Secondary
21/22	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.47 Per pupil	£4.47 Per pupil
22/23	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.57 Per pupil	£4.57 Per pupil
23/24	£832.00	£1352.00	£1664.00	£2080.00	£2704.00	£5.89 Per Pupil	£5.89 Per Pupil
24/25	£881.92	£1433.12	£1763.84	£2204.80	£2866.24	£6.24 Per Pupil	£6.24 Per Pupil
25/26	£917.20	£1,490.44	£1,834.39	£2,292.89	£2,980.89	£6.40 per Pupil	£6.40 per Pupil

13. Proposals

- 13.1 The proposals set out in this report will be included in the consultation with all schools on the proposed school funding arrangements for 2025/26.

14. Appendices

- 14.1 Appendix A – De-delegations per school for 2025/26
- 14.2 Appendix B - Therapeutic Thinking Support Service
- 14.3 Appendix C - Ethnic Minority & Traveller Achievement Service
- 14.4 Appendix D – Trade Union Representation Service
- 14.5 Appendix E – CLEAPSS Service
- 14.6 Appendix F – School Improvement Team
- 14.7 Appendix G – Accountancy, Audit and Pension Administration (Education Functions)
- 14.8 Appendix H - Health and Safety service to schools
- 14.9 Appendix I – Health and Safety Service 2025/26
- 14.10 Appendix J – Legal Duty Holders for Health & Safety

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2025/26

Therapeutic Thinking Support Team

Outline of Proposed Service 2025/26

The Therapeutic Thinking Support Team (TTST) offers evidence-based advice and support to schools through promotion of a Therapeutic approach to manage and reduce difficult and dangerous behaviours. The type of involvement includes whole school support, staff training, staff support, class or year group support, as well as individual support for pupils.

The Team

Vacancy (TTST Manager & Senior EP)

Robyn Stevens (Assistant EP)

Sue Butcher (Primary TTST Adviser)

Madeleine Williams (SEMH Practitioner)

Katy Higgins (SEMH Practitioner)

Vacancy (SEMH Practitioner) – due to start in the next month

Roslyn Arthur (Exclusions and Reintegration Team Manager)

Key Features

1. Quick and flexible response for schools who have pupils presenting with difficult and dangerous behaviours.
2. No cap on requests
3. Different levels of response within the team (whole school, group, individual).
4. Support and advice in relation to Therapeutic approaches; developing therapeutic plans to support inclusion within school
5. The team will be informed by evidence based practice and the Therapeutic approaches, which will result in clear suggestions of what needs to happen to move the situation forward.
6. Partners and working relationships: The team will liaise with other agencies to support the needs of schools and pupils.

What would schools get?

Referrals

1. Rapid Response: capacity to respond rapidly to school concerns. This could relate to children but also whole school situations that arise. Anti-social behaviour would be the main focus but wouldn't exclude other complex situations.
2. For those needing some quick advice, signposting, or consultation, the TTST manager or Roslyn are available for telephone consultations.

3. TTST referrals will be triaged weekly and the most appropriate level of support offered within 5 days.

Whole school/ Systemic support

1. Access to support for challenging whole school situations through adviser with senior level management/Headteacher experience
2. Consultation with the adviser to consider how to develop SEMH provision and support SEMH needs at a whole school level, e.g. revision of behaviour policy, identifying staff training needs
3. Training in some interventions so that school staff can deliver SEMH interventions to pupils, e.g. Homunculi, Lego Therapy
4. Training to individual schools on 'Emotional Regulation'
5. A recorded de-escalation training for whole schools via SLA
6. Literature on a variety of SEMH supports, e.g. check ins, group dynamics, small gardens

Whole class support

1. Adviser support to consider group dynamics of classes; partnership working with the teacher to consider the environment, routines, strategies, the behaviour policy, management of groups of children
2. Write up and actions as well as agreed review of cases where appropriate.

Individual support

1. Observations and discussions with key staff to identify need, review current support and strategies, and consider changes/ agree actions
2. Write up of observations and meetings and review of cases
3. Working with the teacher/SLT to write or review a therapeutic plan
4. Having identified a child or young person's need and provision, following consultation and further analysis, a SEMH Practitioner may offer an intervention to develop the unmet need, e.g. Social skills through Lego Therapy,
5. Support in developing 'Small garden' provision as well as support to transition pupils back into the classroom, when appropriate
6. Support from practitioners where appropriate to help implement/model strategies in school.
7. Access to 'Circle of adults' meetings facilitated by an Assistant Educational Psychologist or a SEMH Practitioner for pupils at risk of permanent exclusion, as a starting point or to aid transition. A Circle of Adults meeting is led by 2 trained workers and involves key staff and professionals from the school. It lasts 1.5 – 2 hours and provides a structured approach to problem-solving and identifying agreed strategies.

Feedback from 2023/2024 delivery

In line with previous years, the TTST annual evaluation has been overwhelmingly positive:

- 80% of respondents found TTST involvement extremely or very helpful

'Kind and supportive. Always offer practical advice. Assurance. Prompt in offering advice.'

- Schools in particular valued:

- Receiving general advice and strategies
- SEMH Practitioners running interventions for pupils
- Class support
- Training

Schools generally noticed an improvement in pupil wellbeing and reduction in anti-social behaviours following TTST involvement, and particularly commented on being given the tools and strategies at support pupil emotional regulation.

Feedback relating to positive changes in children’s SEMH skills:

‘More able to articulate feelings and verbalise what has happened. Improved listening with support.’

‘He is communicating his frustrations verbally rather than becoming physically aggressive towards others. He uses strategies such as breathing and counting when frustration occurs.’

Following TTST involvement, 70% felt that staffs’ knowledge and understanding of a child’s needs had improved a lot.

Additional testimonials:

‘We value the service. We appreciate how quickly you respond and offer support. Positive for us. Thank you.’

Of whole class support:

‘We also had a whole class visit that was great to be able to look at the class as a whole and then to review what was going well and what changes we could make to carrying on creating a calmer learning environment.’

Proposed Cost of Delivery in 2025/26

The following table summarises the proposed cost of the service for 2025/26. It is based on employing the team members outlined above.

	2023/24 £	2024/25 £	2025/26 Proposed £	% increase
Staffing Costs	228,018	236,541	249,428	
Other Costs	6,890	6,890	5,550	
Support Service Recharges	23,491	24,343	25,498	
Total Cost	258,399	267,774	280,476	4.53%
Less Surplus Brought Forward	0	-6,360	-10,690	
Amount to be De-Delegated	258,399	261,414	269,786	3.10%

The overall cost of staffing has increased by 4.5%, mainly due to 2024/25 staffing budgets being built on estimated increases. The overall cost has increased by 3.10% as there is a balance carried forward from 23/24.

This does not take into account income which will be earned from any Academies which choose to buy back this service. Any additional income received from this source will reduce the net cost and the charge to maintained schools.

Method of charging in 2025/26

The total net cost of the service will be divided by the total number of pupils recorded in the October 2024 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £18.79 per pupil. Appendix A of the main report shows the indicative total amount per school.

Other Options which *may* be considered

1. The local authority offer a fully traded service (likely to increase the cost to individual schools).
2. Schools “pay as you go” either by employing/using own staff when needed or purchasing support from external providers (may include the local authority if still able to offer this service).
3. Local authority to consider an alternative (cheaper) service to offer.

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2024/25

Ethnic Minority & Traveller Achievement Service (EMTAS)

Context

EMTAS has been funded through a de-delegation process as agreed with the Heads Funding Group. All the support for ethnically diverse, English as an additional language (EAL) and Gypsy, Roma and Traveller (GRT) pupils is provided by the West Berkshire EMTAS Service.

EMTAS has gone through an academic year of significant change with 3 members of staff leaving including the Team Leader, and one on maternity leave. There are 2 remaining part time staff in the service currently, one Pupil Support Officer and GRT Officer.

15. LA Responsibilities regarding EAL

Local authorities (LAs) in the UK have several statutory duties regarding pupils with English as an Additional Language (EAL). These duties are aimed at ensuring that EAL pupils receive appropriate education and support to achieve their full potential. Key statutory duties include:

1. Ensure Access to Education:

LAs are responsible for ensuring that all children of compulsory school age, including EAL pupils, have access to full-time education suitable to their age, ability, aptitude, and any special educational needs (SEN) they may have. This includes making sure EAL pupils can access the National Curriculum.

2. Promote High Standards:

LAs have a duty to promote high standards of education and fair access to educational opportunity for all children, including EAL pupils. This involves supporting schools to meet the diverse needs of EAL pupils, ensuring they can achieve academic success.

3. Support Schools in Meeting EAL Needs:

LAs are expected to provide guidance, resources, and training to schools to help them meet the needs of EAL pupils. This can include providing specialist EAL teachers, developing inclusive teaching strategies, and ensuring that appropriate assessment and monitoring systems are in place.

4. Safeguarding and Welfare:

LAs have a statutory duty to safeguard and promote the welfare of children in their area, including EAL pupils. This includes ensuring that EAL pupils are not disadvantaged due to language barriers and that their welfare needs are identified and addressed.

5. Equal Opportunities and Non-Discrimination:

LAs must ensure that EAL pupils are not discriminated against based on their language or ethnic background. This includes upholding the principles of the Equality Act 2010, which protects against discrimination in education.

6. Provision of Additional Support:

Where necessary, LAs must provide additional support to schools to meet the specific needs of EAL pupils. This may involve funding for language support programs, translation services, or additional educational resources.

7. Monitoring and Assessment:

LAs are responsible for monitoring the progress of EAL pupils to ensure that they are receiving the support they need and are making appropriate progress. This includes working with schools to track the academic achievement of EAL pupils and identifying any areas where further support may be required.

8. Engagement with Parents and Communities:

LAs should engage with the parents and communities of EAL pupils to ensure they are informed about their children's education and can participate in school life. This might involve providing information in multiple languages and ensuring that communication barriers are minimised.

9. Inclusion and Integration:

LAs are tasked with promoting the inclusion and integration of EAL pupils into the wider school community. This involves supporting schools in creating an inclusive environment where EAL pupils can participate fully in all aspects of school life.

These statutory duties ensure that EAL pupils receive the necessary support to overcome language barriers, integrate successfully into the education system, and achieve their full potential. Departments across Children's services support meeting these duties.

Current Structure

Value is recognised from the school in provision of focused and skilled TA in class to support behaviour and language development. The time a pupil is 'open' to the service is varied and can be up to a year.

The management of the GRT Officer has been taken on by the Senior Education Welfare Officer and the management of the Pupil Support Officer has been taken on by the Medical Tuition Co-Ordinator in the absence of these posts currently.

Training has taken place across the schools.

In West Berkshire the main language spoken by EAL pupils is Polish, however we have 82 different languages spoken across our West Berkshire Schools. Little Health and St Barts have the largest population in Secondary Schools of EAL pupils with Polish, Hindi and Urdu being the most common first languages. St Joseph's Catholic Primary School has the largest population in Primary school with Hindi and Polish again being most common.

		% EAL	No. on Roll
Total	2,376		
Aldermaston C.E. Primary School	6	3	113
Basildon C.E. Primary School	3	2	174
Beedon C.E. (Controlled) Primary School	1	1	16
Beenham Primary School	4	3	53
Birch Copse Primary School	33	18	355
Bradfield C.E. Primary School	4	3	151
Brightwalton C.E. Aided Primary School	2	2	90
Brimpton C.E. Primary School	1	1	42
Brockhurst and Marlston House Schools	2	2	155
Brookfields Special School	23	14	224
Bucklebury C.E. Primary School	2	1	93
Burghfield St Mary's C.E. Primary School	5	4	168
Calcot Infant School and Nursery	21	13	164
Calcot Junior School	41	20	198
Chaddleworth St Andrew's C.E. Primary School	1	1	22

De-delegation, Education Functions and Health and Safety Service Proposals 2025/26

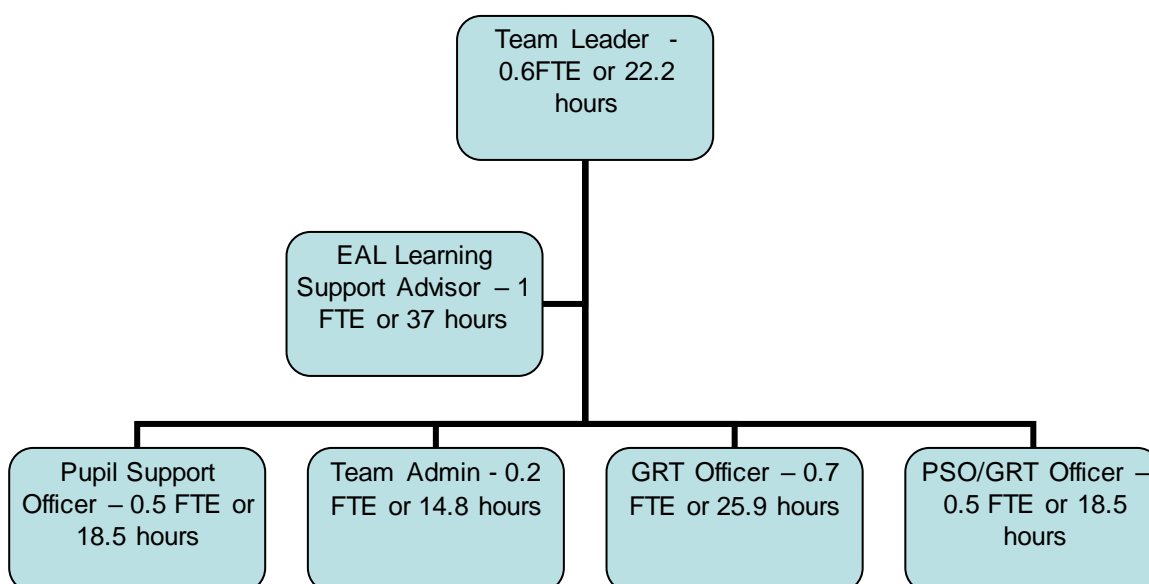
Chieveley Primary School	2	2	150
Cold Ash St Mark's C.E. School	1	1	171
Compton C.E. Primary School	5	4	184
Curridge Primary School	5	3	77
Denefield School	43	18	1111
Downsway Primary School	7	5	180
Elective Home Education	9	6	426
Enborne C.E. Primary School	2	1	78
Falkland Primary School	33	17	418
Fir Tree School and Nursery	40	21	219
Francis Baily Primary School	49	22	550
Garland Junior School	16	10	154
Hermitage Primary School	14	9	181
Highwood Copse Primary School	5	4	89
Hungerford Primary School	21	7	286
iCollege (Alternative Curriculum)	5	5	140
John O'Gaunt School	30	12	453
John Rankin Infant and Nursery School	22	14	193
John Rankin Junior School	33	18	272
Kennet School	138	31	1839
Kennet Valley Primary School	28	14	163
Kintbury St Mary's C.E. Primary School	10	6	130
Lambourn Primary School	15	8	177
Little Heath School	156	36	1665
Long Lane Primary School	18	12	173
Mortimer St John's C.E. Infant School	11	7	120
Mortimer St Mary's C.E. Junior School	19	12	237
Mrs Bland's Infant School	22	13	217
Oaklands School Hungerford	1	1	12
Pangbourne Primary School	23	14	175
Pangbourne Valley Playgroup	1	1	17
Park House School	40	15	998
Parsons Down Partnership Infant	7	3	60
Parsons Down Partnership Junior	22	14	145
Purley CE Primary School	9	6	94
Robert Sandilands Primary School and Nursery	37	16	202
Shaw -cum-Donnington C.E. Primary School	6	5	74
Shefford C.E. Primary School	6	2	44
Speenhamland School	91	28	247
Springfield Primary School	36	19	285
Spurcroft Primary School	46	22	409
St Bartholomew's School	200	35	1983
St Finian's Catholic Primary School	7	5	170
St John the Evangelist C.E. Nursery and Infant	43	18	131
St Joseph's Catholic Primary School	158	28	243
St Nicolas C.E. Junior School	57	25	189
St Paul's Catholic Primary School	67	17	252
Stockcross C.E. School	7	4	77
Streatley C.E. Voluntary Controlled School	2	2	80
Sulhamstead and Upton Nerve School	1	1	79
Thatcham Park Primary	27	14	346
The Castle School	15	9	172
The Downs (Foundation) School	13	9	1404
The Grange School	2	2	8
The Ilsleys Primary School	2	2	54
The Willink School	72	20	1253
The Willows Primary School	70	20	361
The Winchcombe School	99	25	389
Theale C.E. Primary School	21	12	274

Theale Green School	43	16	755
Trinity School	149	32	1142
Welford and Wickham C.E. Primary School	1	1	56
Westwood Farm Infant School	32	17	218
Westwood Farm Junior School	25	14	176
Whitelands Park Primary School	19	9	342
Woolhampton C.E. Primary School	4	4	89
Yattendon C.E. Primary School	1	1	75

Total EAL Referrals Sep 2023 - August 2024		
No. of Schools	No. of Pupils	Referral Type
		EAL
	10	EY
	9	Transition: FS2 to Yr1
	7	Romanian
	6	Ukrainians
	5	Polish
	1	Afghan
	25	Other
23	63	Total

In September 2020 EMTAS was restructured and moved to be part of the Education Welfare and Safeguarding Service (EWSS).

Currently, EMTAS is financed to support a structure of:



At last year's (23/24) Schools Forum, there was an agreement to remain with the structure and cost of the team with some savings in project work and other lines from the budget. This brought amount to be de-delegated to £214,610.

It is proposed that due to the significant changes within the EMTAS service that this is an opportunity to revisit the service and ensure that it is value for money for all schools.

Benefits:

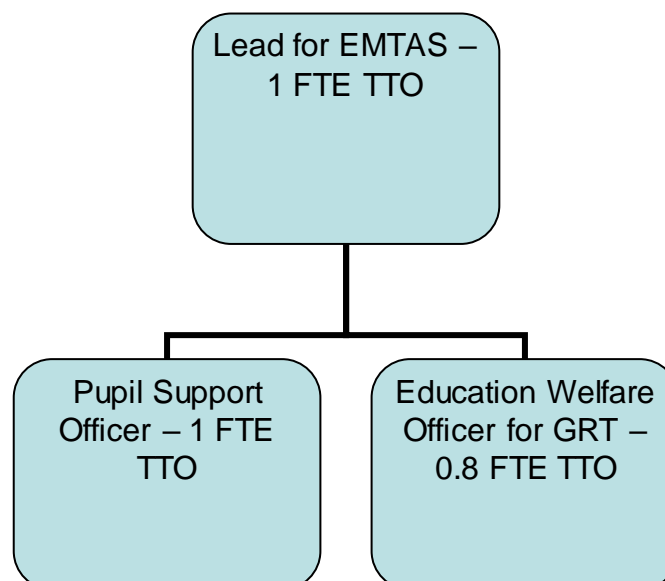
- Highly regarded service by schools
- Invaluable training on EAL across the Borough
- INSET training for staff
- EAL vs SEN support
- Money available for additional TA time for EAL pupils
- Bilingual support for Romanian and Polish to date
- Health link to education for GRT
- Link to GRT families
- GReaT programme for 1:1 support for GRT pupils to improve phonics

Risks:

- Not all schools that contribute benefit from the service
- The schools with the higher numbers of EAL are not always the ones that require the support
- Assessments can be completed by school
- No progress data available
- No specific time-limited intervention
- Staff are employed for full days which does not replicate the school day
- Over ½ service has left – unable to recruit on FTC until March 2025 (less than 6 months for recruitment/training etc)
- Due to de-delegated income, contracts would have to be Fixed Term unless agreed to fund for over 2 years.
- Limited knowledge on assessments remains in service
- Limited training experience remains in service
- Underspend for 24/25

Suggestions for Schools Forum decision:

- 1) **PROPOSAL 1** - Re-design the EAL/GRT support with a more strategic/training focus. We have already compiled an informative SLA ONLINE provision for schools to access advice and guidance which needs to be maintained as a one stop information hub for EAL/GRT. This would be coupled with a good EAL training programme to run across the academic year from September 2025 – 2026. The structure of the service would be:



The focus of the staff would be to prioritise language support where most needed across the schools with this greatest need. Support would look like in the form of a comprehensive training plan with support for completing EAL assessments.

The service re-designed referrals to ensure that the right information was received and prioritise support for the most vulnerable pupils especially where there were SEND.

Schools would continue to receive support with engagement with their GRT families in multiple areas e.g. the EHCP process, issues around safeguarding, behaviour, avoiding exclusion, intervention for gaps in learning, transition, delivery of culturally sensitive topics (Sex Education), transport, admissions, attendance, housing and Elective Home Education.

Cost of service is: **£183,315**

This is the equivalent to **£11.17** per EAL/GRT pupils in our schools and a reduction from the current £12.97 per pupil.

With the reduced costs into the service, schools will be able to employ TAs directly but there is also a continued budget of £17k within the budget to still support schools where requested.

The Team Leader is responsible for the day-to-day management of the service.

- Production and execution of EAL strategy across the LA and schools in West Berkshire to meet the needs of pupils and schools, promoting inclusion and successful language development
- Organisation of English language assessments of EAL pupils for whom language may be a barrier to learning, writing advisory reports with recommended strategies where schools are unable to action.
- Arranging advice and support for individual pupils, including those with EAL and possible SEND needs and those in the EHCP process.
- Supporting schools and families of vulnerable pupils at professional's meetings linked to EHCPs.
- Training package of support for teachers and teaching assistants EAL/GRT and reducing barriers to learning.
- Organisation of tailored packages of support to schools to meet the needs of ethnically diverse pupils and those from Gypsy, Roma, Traveller families e.g. managing the GRaT 121 programme – training teaching assistants through targeted workshops to deliver intervention programmes to narrow the attainment gap with their peers and to reduce inequalities.
- Tracking the attainment of GRT pupils termly to inform interventions and the allocation of the GRT Pupil Support Officer.
- Multi-agency approach to support schools with EAL and GRT pupils.
- Support refugees/asylum seekers access education swiftly
- Provide EAL and GRT advice, guidance, and resources to schools.

The EAL Learning Support Adviser is responsible for providing support to schools. This includes:

- Completion of EAL assessments for pupils who may be finding it difficult to access learning. Providing advisory assessment reports with recommendations and guidance for classroom teachers.
- Supporting and delivering training at a corporate level for Heads, SLT, Inclusion Leads, SENCOs and teachers. Also, deliver in school workshops for support staff to understand the needs of EAL learners, share useful strategies and resources.
- Signpost resources and learning to schools

The Pupil Support Officers (PSO) work with schools supporting individual and small groups of pupils:

- Support is focused on helping vulnerable pupils to access the curriculum and improve English acquisition.
- PSOs may support schools with parent communication, in school meetings regarding SEND and the EHCP process to support vulnerable pupils.
- PSOs will train staff and provide appropriate resources to support pupils.
- The Pupil Support Officer for GRT pupils has a wider brief involving extensive liaison between families, staff, and other professionals. May be allocated to deliver short-term weekly interventions in school, after a referral either due to concerns about academic progress or behaviour. GRT families are supported with attendance, admissions, transition, and engagement with learning. GRT PSO is specifically targeted with raising attendance and attainment of pupils from the GRT community recognising barriers and supporting schools with inclusion including curriculum. There is also a strong health link.

Benefits of Service

EAL assessments

Referrals for EAL assessments were received from 19 West Berkshire Schools from the beginning of the September 2023 to August 2024 academic year: total 63 pupils. There have not been any referrals from Secondary Schools.

No. of Schools	Name of Schools (Teaching Assistant funding)	Name of Schools year1
17	St. Nicolas CE Junior School	Curridge Primary School
	Kintbury St. Mary's CE Primary School	Hermitage Primary School
	John Rankin Schools	Birch Copse Primary School
	Parsons Down Partnership of Schools	Robert Sandilands School
	Beenham Primary School	Calcot Schools
	The Willows Primary School	St. Paul's Primary School
	Long Lane Primary School	St Johns
	Mrs. Bland's Infant & Nursery School	Shaw-cum-Donnington Primary School
		St. Joseph's School
1	John Rankin Schools	
1	Aldermaston	

In school TA Funding:

In addition to bilingual support, EMTAS provided funding for Teaching Assistants within schools to support EAL learners in the early stages of English acquisition. EMTAS increased the hourly rate to £10.43 per hour in September 2018 to be more in line with current Teaching Assistant pay. This has risen to £12.13 an hour and funding will now replicate this inflation.

Number of TA funded hours given to schools:

TA Funding 2023-24 (Academic Year)				
	£allocation	Hours	No. of Pupils	No. of Schools
EAL - Sep 2023 - March 2024	£10,221	980	64	17

EAL - April 2024 - July 2024	£522	50	5	1
GRT121	£156	15	1	1
TOTAL	£10,899	1045		
2023-24 budget	£17,000			
% spend of total budget	64%			

Schools in receipt of GReaT121 project funding during 2022/23 to provide targeted intervention for Gypsy, Roma and Traveller pupils.

Great121 - total £939

Training provided (Shaw House and individual schools)

Academic Year 2022/23
EMTAS delivered corporate training – ‘How to meet the needs of New Arrivals’ this year and will be increasing this to three, two hour sessions (one per term).
EAL training for TAs who are to deliver EAL interventions after an EAL assessment outcome.
Moving forward, additional EAL workshops allocated as well as TA intervention will provide a further increased tailored support for schools.

Number of families supported by Pupil Support Officer (GRT)

West Berkshire has 115 children who are ascribed as Gypsy, Roma or Traveller.
33 West Berkshire schools have Gypsy, Roma and Traveller pupils on roll.

22 GRT children have been supported in 20 schools (an increase of 50%) seeking guidance and support by the PSO GRT. Transition support has been provided between schools and also when pupils have been transferring from out of West Berkshire into our schools. This work involves ‘in year’ changes as well as end of Key Stage transitions.

EMTAS Pupil Support Officer for GRT pupils has supported children and families from GRT backgrounds during 2022/23. This included face to face sessions and a range of home/school visits, as well as consultations with SLT at schools with a high proportion of GRT pupils.

The following schools have received support from EMTAS for Gypsy, Roma and Traveller pupils.

Aldermaston	Mortimer
Brimpton	Mrs Bland’s
Burghfield St Mary’s	Purley
Calcot	Robert Sandilands
Castle	SUN
Engaging Potential	Thatcham Park
Garlands	The Downs
Hermitage	Theale Green
i-college	Westwood Farm
Kennet	Willink

Schools have been supported with engagement with their GRT families in multiple areas e.g. the EHCP process, issues around safeguarding, behaviour, avoiding exclusion, intervention for gaps in learning, transition, delivery of culturally sensitive topics (Sex Education), transport, admissions, attendance, housing and Elective Home Education.

GRT Outreach:

Over the previous years, EMTAS has delivered engagement sessions for pre-school children via the hire of the Bus Of Hope facility. This included sessions 9/12 months of the year at Paices Hill traveller site based in Aldermaston. Unfortunately, due to governance issues at the BOH and mechanical ones of the bus; this has led to the end of this collaborative project. A positive outcome has been the emergence of new co-production with an NHS Health Bus helping to reduce inequities in the WB community. This is going well and has seen many families benefit from co-working across the services.

Ukrainian families

Since the Ukrainian families arrived in West Berkshire, their transition has been supported with EAL assessments and guidance reports. Also, by delivering training to staff to understand their wider needs. Support specifically for these families and to meet the LA duties of safeguarding and regular check ins with the families transitioning over from Ukraine was carried out by an Education Welfare Officer specifically focused on Ukrainian families, working closely with the Ukrainian Hub. This post and funding has now ceased.

Proposed Cost of Delivery in 2025/26

The following table summarises the proposed cost of the service for 2025/26 in comparison with previous years.

	2023/24 £	2024/25 £	2025/26	% change
Staffing Costs	169,080	178,080	149,630	
Other Costs	17,020	17,020	17,020	
Support Service Recharges	18,610	19,510	16,665	
Total Cost	204,710	214,610	183,315	-17%
Less Surplus Brought Forward	-17,692	-28,440	-22,910	
Amount to be De-Delegated	187,018	186,170	160,405	-16%

Method of charging in 2025/26

The total cost of the service will be divided by the total number of pupils recorded in the October 2024 census to arrive at a per pupil amount for charging purposes. Based on October 2023 census data, this equates to £11.17 per pupil. Appendix A of the main report shows the total amount per school.

Other Options which may be considered

Schools receive a high-quality level of support in West Berkshire which has been highly valued by those that have used the service. The centrally funded service has allowed all schools to receive the level of support that they need which has not been directly linked to the number of pupils in schools.

If schools did not support a centrally delivered service to meet the needs of English as an additional language learners and those from the Gypsy Roma Traveller community they could expect to have to purchase support.

West Berkshire Council Maintained Schools**Proposal to De-Delegate Formula Funding 2025/26****Trade Union Representation Service****Outline of Proposed Service 2025/26**

West Berkshire Council has a school trade union facilities agreement which includes provision for compensating individual schools for release time for teacher trade union representatives they employ. Compensation is paid from the dedicated schools grant (DSG).

Union representatives attend joint consultation meetings with the authority and meetings with head teachers and HR on a variety of employee relations matters. The latter includes TUPE consultation meetings where schools converted to academy status; consultation on reorganisations of teaching and support to staff (note: NASUWT and ATL also represent non teaching staff; NEU only represents teachers); disciplinary issues; grievances; ill health cases; capability cases; and settlement agreements

What union officers do

Union officers use 'facilities time' to work with members experiencing professional difficulties (casework) and to support groups of members either in individual schools or through negotiation and consultation with the local authority acting on behalf of its schools (collective work). The casework dealt with by union officers falls into two broad categories: individual issues and collective issues.

Individual casework issues

The union officers spend most of the facilities time dealing with members. Union members in West Berkshire schools are able to contact their union representative directly by email or telephone. Issues raised by members in this way are known as casework. Casework can be divided into capability; disciplinary; grievance; and contracts, pay and conditions

Advice is often given on how the teacher/support staff can seek to resolve the matter for themselves. However, there are a number of cases where the union officer has to make contact with school management, human resources providers or an LA officer directly. Employees are entitled to be accompanied by a union officer at formal meetings under school HR procedures.

Contracts, Pay and Conditions issues such as pay determination appeals and questions of what teachers can be directed to do are becoming increasingly common.

Collective Issues

These include consultation on changes to working conditions such as pay policies, sickness absence policies, codes of conduct restructuring and redundancy.

This school year has seen an increase in the number of school restructurings accompanied by the risk of redundancy, as school budgets come under increasing pressure. The redundancy procedure is complex and often involves multiple meetings. The

threat of redundancy can quickly undermine morale in a school and often the role of union officers is to reassure and support employees as well as ensuring that correct procedures are followed.

Proposed Cost of Delivery in 2025/26

The following table summarises the proposed cost of the service for 2025/26, compared to 2024/25. It is based on engaging a representative from each of the unions:

	2024/25 £	Proposed UPS3 2025/26 £
Total Direct Costs	£64,036	£68,884
Support Service Recharges	£6,404	£6,888
Total Cost	£70,440	£75,772
Income from Nursery and Special Schools and PRUs	£2,149	£2,520
Cost to Primary and Secondary Schools	£68,291	£73,252

The proposed budget for 2025/26 is based on:

- Reimbursement to schools providing release time (not the salary of the union representative for trade union activities) is dependent on agreement by Schools Forum in respect of maintained primary and secondary schools and from other schools which elect to buy in the facilities time – the budget is calculated as approximately equivalent to 1fte teacher paid on UPS3 across all unions;
- Each trade union to have five days for regular activities including attendance at local authority consultative meetings;
- Balance of budget available is divided proportionately by the number of current members in each union as at 1st June (the budget will be adjusted depending on the actual level of buy back from other schools).

Note that representatives work across all sectors, and it is irrelevant what type of school they are employed by. Therefore the total net cost is divided between all schools de-delegating rather than taking each sector separately.

Method of charging in 2025/26

The total cost of the service will be divided by the total number of pupils recorded in the October 2024 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £5.10 per primary and secondary pupil. Appendix A of the main report shows the indicative total amount per school. Academies and other schools may choose to buy into the service at the same per pupil rate (this would provide funding for additional hours).

Other Options which *may* be considered

It should be noted that once a decision has been made to discontinue pooling arrangements, it would be almost impossible to reverse that decision at a later date.

Therefore the HFG and SF need to be aware that a decision to cease pooling arrangements for this budget would be permanent.

There may be the option to consider a reduced service at a lower cost to schools.

West Berkshire Council Maintained Schools Proposal to De-Delegate Formula Funding 2025/26 CLEAPSS Service

Outline of Proposed Service 2025/26

West Berkshire Council has an agreement with CLEAPSS (Consortium of Local Education Authorities for the Provision of Science Services) which includes the provision of support and advice to teachers, technicians, head teachers and governors/trustees on how best to use high quality practical work to support pupils learning in science, design & technology and, most recently, art & design.

All but two of the 182 authorities, with the duty to provide education, in England, Wales and Northern Ireland and the various islands, are members of CLEAPSS.

The Local Authority can offer schools and academies the opportunity to purchase an annual CLEAPSS subscription at a heavily discounted price from that which schools would pay to CLEAPSS independent of West Berkshire Council.

The CLEAPSS service also requires the provision of a Radiation Protection Officer (RPO) and the Radiation Protection Adviser (RPA) for secondary schools and academies who will require some radiation sources on site as part of the national curriculum.

Benefits of Service

CLEAPSS covers:

- Health & safety including model risk assessments
- Chemicals, living organisms, equipment
- Sources of resources
- Laboratory design, facilities and fittings
- Technicians and their jobs
- D&T facilities and fittings

CLEAPSS provides:

- Termly newsletters for primary and secondary schools
- A wide range of free publications
- Model and special risk assessments
- Low-cost training courses for technicians, teachers and local authority officers
- A telephone helpline
- A monitoring service, e.g. for mercury spills
- Evaluations of equipment
- Advice on repairs
- A H&S / Review of service publishers, exam boards and other organizations producing teaching resources

The local authority will have met the conditions of membership if all community schools subscribe.

Costs and Method of charging for 2025/26

CLEAPSS set the pricing each year in February/March for the financial year April to March ahead. In 2024/25 the charge to schools was 19 pence per pupil including administration costs. For secondary schools who require the service of a Radiation Protection Officer (delivered by WBC Health & Safety Team) and a Radiation Protection Adviser (delivered by CLEAPSS) there are additional costs of £250 per annum for the Radiation Protection Officer for the Radiation Protection Adviser.

The proposal for 2025/26 is to keep the same rate per pupil to 19 pence per pupil.

As the de-delegation covers pre-16 pupils only, maintained secondary schools will need to pay the 6th form element of the fee as a separate sum.

The charges for the RPA and RPO service will also remain the same at £250.

Independent, Academies, Foundation and VA schools may purchase the CLEAPSS subscription directly through CLEAPSS.

The cost per pupil/school is shown in the table below in comparison with the cost of buying this service directly from CLEAPSS, the RPA/RPO service is not available directly from CLEAPSS.

School	Cost through local authority per pupil	Cost directly per pupil (min 200 pupils/ 350 secondary)	Radiation Protection Advisor	Radiation Protection Officer
Nursery	19p	32.5p	N/A	N/A
Primary	19p	32.5p	N/A	N/A
Secondary	19p	32.5p	£60	£190
Special	19p	32.5p	N/A	N/A
PRU	19p	32.5p	N/A	N/A
Primary Academy	19p	32.5p	N/A	N/A
Secondary Academy	19p	32.5p	£60	£190
Incorporated colleges	19p	32.5p	£60	£190

West Berkshire Council Maintained Schools
Proposal to De-Delegate Formula Funding 2025/26
School Improvement Team

Outline of Proposed Service 2025/26

1. Statutory Functions

1.1 From section 13A of Education Act 1996:

“Duty to promote high standards and the fulfilment of potential”

When delivering school improvement functions, LAs must also have regard to the Schools Causing Concern statutory guidance. The guidance covers “Schools Causing Concern” but also other maintained schools which the LA has serious concerns about and needs to be addressed.

To fulfil these requirements, the LA is required to have the expenditure to:

- Monitor all maintained schools (visit to schools at risk, data monitoring; categorisation of support)
- Have the resources to be able to take action where necessary to support the improvement of standards in particular, This includes issuing Warning Notices where there are concerns about standards, leadership, governance , finance or the safety of pupils.

1.2 Monitoring National Curriculum Assessment Arrangements

Expenditure on monitoring NC assessment arrangements required by orders made under section 87 of the 2002 Education Act.

Under the Education (NC) (KS1 Assessment Arrangements) Order 2004, a local authority must:

- Appoint a person who has recent experience of provision of the NC in primary schools.
- LAs have equivalent duties in KS2

(Currently costed at £25k per annum)

1.3 Religious Education

A local authority must:

- Set up a standing advisory council on religious education (section 390 Education Act 1996); and

- Prepare an agreed syllabus of religious education in accordance with Schedule 31, Education Act 1996. (currently costed at £4K per annum)

2. Other services provided free of charge

2.1 The School Improvement Team is currently funded by DSG and also the traded side of the service. There is however a significant part of the service that is provided free for all maintained schools, regardless of whether they buy into the Traded service or not.

This includes:

1. **Ofsted** support – 24/7 support from an experienced adviser from the first phone call from Ofsted to the feedback at the end of the inspection. Support for staff as and when needed and rapid support when issues need to be closed down, school end. From January 2023 we have been attending during the actual inspection if the HT has requested it. This is due to the heightened emotions and tensions surrounding the Ruth Perry tragedy and the increased stresses that an inspection creates for the school and its leaders. Issues can be raised during the inspection with the support of the School Improvement team.
2. **Safeguarding audits** – Initially conducted for all schools in the immediate window for an Ofsted Inspection. The school Improvement team would like these audits going forwards, to be more regular. These are conducted with the person responsible for the SCR and DSLs/DDSLs. SCR/responsibilities/Governor involvement. Areas include;
 - a. A visual check of the SCR, picking up any issues (if any)
 - b. Overseas checks, identity checks, Section 128 etc
 - c. Staff and governor Training and how that is recorded, DSL compliance.
 - d. KCSIE/safeguarding updates
 - e. Early help procedures
 - f. Safer recruitment training
 - g. Staff personnel files
 - h. Record keeping/system used for safeguarding
 - i. Part time timetables/CME/AP provision and checks made on the providers
 - j. Filtering and monitoring
 - k. Site security
 - l. PREVENT training
 - m. SRE
3. Supporting schools when they are making **formal complaints to Ofsted**. Meeting with the HT/Governors and compiling and producing reports to support the complaints procedure.
4. Support for schools producing evidence to the DFE for **Revocations of Academy** orders.
5. **Ofsted Meetings** – attending regular meetings with HMI and the regional director to support our schools during Inspection and ensure that issues and concerns are raised promptly and that action is taken. E.g certain inspectors were not operating within the guidelines for their Code of Conduct. These inspectors were not scheduled again within the authority.

6. **Weekly KIT emails** – to ensure that links and resources are sent in a timely manner, so that Head Teachers have current DFE and Ofsted updates and are not missing deadlines for statutory compliance.
 7. **Well being support for school leaders.** Visits and signposting to ensure Leaders are supported through a whole host of issues that might be affecting them.
 8. **Primary Heads Forum** – Focused presentations that share information to upskill and support Head teachers 5x across the year.
 9. **Head teacher recruitment** – a School Improvement Adviser to support, sit on the Headteacher Appointment Panel, advise the panel on the process of recruitment, support with panel questions and presentations and both the adviser and Director Of Education attends the final panel.
 10. **Documentation** – Any documents we produce are sent out to all schools e.g
 - (i) Templates for Deep Dives
 - (ii) Questions for middle leaders
 - (iii) Expertise knowledge and signposting in any area
 11. **Website checks on all schools in the ofsted window**, against the DFE’s criteria, to support schools to ensure that they are compliant with the updated requirements.
 12. **Re categorisation** –
 - a. **Outcome 3 for Section 8 Inspections** – up to 3 days further support for maintained schools that are a cause for concern.
 - b. **Support of Outcome 4 schools** – at least 3+ days of intensive support.
 - c. **Schools that have to operate a MOU** to ensure that they have a HT are supported by an experienced School Improvement Adviser.
 13. **Email queries** from all school staff and leaders about all areas of school improvement.
 14. **Support for schools receiving Ofsted complaints** – supporting Chairs of Governors through the complaints procedure, meeting with HTs and offering bespoke support as needed.
 15. **Deficit support for schools needing advise and support.**
 16. **Targeted support for schools with lower than expected Key Stage results.**
 - a. Pedagogy training across the year.
 - b. Learning Walks and support within schools.
 17. **Subsidised courses** wherever possible.
 18. **New to Headship** – 3 days of free support from an experienced School Improvement Adviser and a mentor provided by the LA.
-

- a. **Training in the autumn term on change management, SEF, IDSR and SDP planning.**
- b. **Supporting documentation for the first year of Headship.**

19. **Free Safeguarding Governor network** – to support this vital area within the responsibilities of the Governing Body.

3. Proposed Cost of Delivery in 2025/2026

3.1 The School Improvement service has been funded by a grant since 2017.

3.2 In October 2021, the DFE consulted on the future funding of the service with the proposal to:

- (i) Phase out the current grant funding by the start of 2023/24
- (ii) Reduce the grant in 2022/23 to 50% of the current amount on a per school basis
- (iii) The remaining 50% funding to be de-delegated to schools in 2022/23

3.3 For the 2023/24 year & beyond the service will be wholly funded by de-delegation

3.4 The following table summarises the proposed cost of the service for 2025/26.

	2023/24 £	2024/25 £	2025/26 Proposed £	% increase
Staffing Costs	292,681	294,415	287,436	
Other Costs	15,480	24,315	15,770	
Support Service Recharges	30,816	31,873	30,321	
Total Cost	338,977	350,603	333,527	-5.12%
Less Surplus Carried Forward	-130,000	-59,220	-23,254	
Amount to be De-Delegated	208,977	291,383	310,273	6.1%

The overall cost of staffing and overheads has decreased by 5.12%, this is mainly due to a reduced spend on moderation in KS1.

This does not take into account income which will be earned from any Academies which choose to buy back this service. Any additional income received from this source will reduce the net cost and the charge to maintained schools.

Method of charging in 2025/26

The total net cost of the service will be divided by the total number of pupils recorded in the October 2024 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £21.61 per pupil. Appendix A of the main report shows the indicative total amount per school.

Other Options which *may* be considered

1. The local authority offer a fully traded service (likely to increase the cost to individual schools).
2. Schools “pay as you go” either by employing/using own staff when needed or purchasing support from external providers (may include the local authority if still able to offer this service).
3. Local authority to consider an alternative (cheaper) service to offer.

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2025/26

Statutory and Regulatory Duties - Accountancy, Audit and Pension Scheme Administration

Accountancy (Statutory Functions)
<p>Description of Duties: Consolidation of school accounts into Council's year end statement of accounts. Overview of school budget submissions & budget monitoring reports. Monitoring of schools in financial difficulty/deficit. Monitoring adherence to Scheme for Financing Schools. Returns to Central Government – CFR, CFO grants return. Administration of grants & other funding to maintained schools eg. PPG, budget allocations & adjustments. Budgeting and accounting functions relating to maintained schools (Sch 2, 74)</p>
Cost: £56,571
0.32 FTE Accountants; 0.39 FTE Senior Accountant; 0.02 Schools Accountancy Manager; 0.14 FTE Finance Manager Total FTE 0.87
Pension Scheme Administration
<p>Description of Duties: Administration of Teachers and Local Government pension schemes in relation to staff working in maintained schools: Amending and updating employee records in relation to pensions Responding to queries from employees in relation to pensions Completion of statutory monthly returns to Teachers Pensions and Local Government pension scheme, including service and pay calculations.</p>
Cost: £40,766
1.0 FTE Pensions Assistant

Internal Audit of Schools – Statutory Requirements

Description of Duties:

Annual internal audit of maintained schools according to level of risk - circa 10 schools are audited per year. Each audit takes on average 7 days. The audit covers Governance; financial planning and management; financial policy, processes and records; benchmarking and value for money; school fund, SFVS.

We also carry out follow-up reviews for those schools that have a weak or very weak audit report opinion.

There is provision for adhoc advice to schools/issuing the Anti Fraud Advisory Bulletins and the investigation of any financial irregularities. We also monitor compliance with submitting the SFVS returns.

We have also included an element of time for the planning and monitoring of the school visit programme, and liaising with Accountancy /governor support etc on queries when they arise.

Cost: £53,405

0.65 FTE Senior Auditor; 0.09 FTE Audit Manager

Proposed Cost of Delivery in 2025/26

The following table summarises the proposed cost of the service for 2025/26, compared to 2024/25.

	2023/24 £	2024/25 £	2025/26 Proposed £
Accountancy	52,626	54,607	56,571
Audit	52,911	52,781	53,405
Pension Scheme Admin	35,864	38,797	40,766
Total Cost	141,401	146,185	150,742
Less income from Special and Nursery Schools and PRUs	4,302	4,460	5,014
Amount to be De-Delegated	137,099	£141,725	£145,728

Method of charging in 2025/26

The total net cost of the service will be divided by the total number of pupils recorded in the October 2024 census to arrive at a per pupil amount for charging purposes. Using October 2023 census data, this would equate to £10.15 per pupil. Appendix A of the main report shows the indicative total amount per school.

Other Options which *may* be considered

1. The local authority offer a fully traded service (likely to increase the cost to individual schools).
2. Schools “pay as you go” either by employing/using own staff when needed or purchasing support from external providers (may include the local authority if still able to offer this service).

Local authority to consider an alternative (cheaper) service to offer.

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2025/26

Statutory and Regulatory Duties – Health and Safety

1. Introduction

- 1.1 The Council has an established, professional and well regarded Health and Safety Team that already supports West Berkshire schools.

2. Background and Legislative Context

- 2.1 The principal legislation in the United Kingdom for health and safety is the Health and Safety at Work etc. Act 1974. There is also a considerable amount of health and safety legislation under the Health and Safety at Work Etc Act 1974 including the Management of Health and Safety at Work Regulations etc.
- 2.2 The Management of Health and Safety at Work Regulations set out that every employer shall appoint one or more competent persons to assist him in undertaking the measures s/he needs to take to comply with the requirements imposed by the relevant statutory provisions.
- 2.3 The regulations state that the employer shall ensure that the number of competent persons appointed, the time available for them to fulfil their functions and the means at their disposal are adequate having regard to the size of the undertaking, the risks to which employees are exposed and the distribution of those risks throughout the organisation. It should be noted that the regulations do not suggest any limit or scope to the competent advice or how it should be delivered practically.
- 2.4 The regulations also state that where there is a competent person in the employer's employment, that person shall be appointed in preference to a competent person not in his employment.
- 2.5 The duties imposed by the health and safety at work Act 1974 and associated regulations apply to the Council as an employer and it would also apply to the Council in relation to Local Authority maintained schools as the Council is the employer.
- 2.6 In the case of Foundation and Voluntary Aided schools the Governors are the employer. In independent schools and Academies the Governors or the Academy Trust are the employers.
- 2.7 The Council also has the general "duty to educate", even where the Governors or an Academy Trust are the employer, there could be some limited involvement for the Council if a serious incident were to occur. See Appendix B for further information on the legal duty holders.

3. The Councils Health & Safety Support Service to Schools

- 3.1 The Council offers a health and safety support services to West Berkshire schools in line with the service level agreement offered to all schools included in the dedelegation system.
- 3.2 Following a decision to change the way the service operated in 2020/2021 since then all maintained schools have had the Level Two (Enhanced) service. This is a comprehensive health and safety support service and covers all aspects of health and safety management and support including necessary health and safety training, health and safety compliance and advice for schools.
- 3.3 As the Council is the employer and therefore the principal legal duty holder (not withstanding any delegated responsibilities to a schools, Head Teachers and Governors) in relation to health and safety, it makes sense to ensure an adequate, effective and efficient health and safety service is provided to Local Authority maintained schools and then a buy-back option offered to non-maintained schools.

4. Proposal

- 4.1 The schools health and safety service would be provided to all maintained schools, continuing on from the previous year. This will meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation.
- 4.2 Schools will pay a graduated fee based on pupil numbers. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.
- 4.3 A buy-back option would continue to be offered to schools such as academy and independent schools. Income generated from buy-back services would be invested in the service or offset to reduce costs for the schools in the collective agreement.
- 4.4 Table 1 below shows the 25/26 cost if all Local Authority maintained schools, Voluntary Controlled, Voluntary Aided and special schools agree to one equal service. Due to rising costs it has been necessary to increase the cost of the service by 4%.

Table 1

Pupil No's	Band A 0-60	Band B 61 - 100	Band C 101-200	Band D 201-300	Band E 301- 465	Band F +466	Band G Secondary
21/22	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.47 Per pupil	£4.47 Per pupil
22/23	£800.00	£1,300.00	£1,600.00	£2,000.00	£2,600.00	£4.57 Per pupil	£4.57 Per pupil
23/24	£832.00	£1352.00	£1664.00	£2080.00	£2704.00	£5.89 Per Pupil	£5.89 Per Pupil
24/25	£881.92	£1433.12	£1763.84	£2204.80	£2866.24	£6.24 Per Pupil	£6.24 Per Pupil
25/26	£917.20	£1,490.44	£1,834.39	£2,292.89	£2,980.89	£6.40 per Pupil	£6.40 per Pupil

There are no discounts based on federated schools. However, schools who operate on the same site would pay one fee based on a combined pupil total up to 465 pupils when it will be charged per pupil. Maintained nursery schools would pay Band A due to the part time nature of their pupils.

4.5 Table 3 below shows the cost of providing the enhanced service:

Table 3	2025/26 Proposed £
Staffing Costs	122,560
Other Costs	9,270
Support Service Recharges	13,180
Total Cost	145,010
De-delegated basic income @ £6.40 per pupil	95,814
Remainder cost to be met by all Maintained Primary and Secondary Schools via a top up to support the delivery of the Health & Safety Service.	49,196

5. Recommendation

5.1 Schools consider the option set out above to maintain the current level of service.

6. Conclusion

6.1 The Council recognises that safety is important but needs to be approached creatively and should not be seen as simply another legal burden or bureaucratic chore. A planned approach to managing risk should be seen as an enabler, not just to prevent accidents and work related health problems for both staff and pupils but to build a culture of sensible risk management, linked to a curriculum where teaching young people can develop their capability to assess and manage risk.

6.2 The Council will continue to support sensible and pro-active health and safety management in schools by providing a supportive infrastructure and service to schools.

6.3 If the recommendation above is not accepted then schools should identify what system they would prefer and the service offer and financial implication can be calculated accordingly.

7.

West Berkshire Council Maintained Schools

Health and Safety Service 2025/26

The Health and Safety Team are part of Finance and Property Service in the Resources Directorate. Our address is: Council Offices, Market Street, Newbury RG14 1BZ

Overview of Service

West Berkshire Council has a professional and dedicated Schools Health and Safety Team who provide support and advice to schools on all aspects of health and safety including an online safety management system incorporating accident reporting, compliance management and a resource library.

The Schools Health and Safety Team also work on policy development and effective implementation, user friendly guidance and information, support in completing risk assessments, a complete range of health and safety training, safety alerts and health and safety newsletters.

8. Schools Health & Safety Needs Assessment

9. Schools Health & Safety Needs Assessment are designed to measure levels of compliance with legislation and best practice. The associated action plan will help you prioritise your improvements. The assessment is conducted using a process of objective evidence gathering including a review of safety documentation, discussions with relevant managers and staff and a tour/inspection of the site.

10.

11. We have operated the current system of needs assessments for six years now and have seen schools develop their health and safety management system but continued improvement is still required. In order to free resource time that could be better utilised helping schools improve on the areas identified in the needs assessments, we propose to continue with the needs assessments with an amended schedule and to develop topic based assessments that will enable greater depth and time to be devoted to specific topics.

12.

Schools will be able to request a new needs assessment at any time, which will be booked at the earliest mutually convenient opportunity at no additional cost to the school.

13. There are a set number of questions in the Schools Needs Assessment, each carrying a maximum score of 4. Any question marked not applicable will reduce the total maximum score possible accordingly. The frequency of needs assessments discussed above has been included in Table 1 below.

Table 1

Overall Score	Description	Score Range Achieved	Frequency between assessments
91%+	Schools which score 91% or above on the previous needs assessment will require a new needs assessment completed in up to 5 years. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.	91% and above	Up to 5 years
80% to 90%	14. Schools which score 80-90% on the previous needs assessment will require a new needs assessment completed in up to 4 years. Support will be provided in intervening years on the areas identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.	80% to 90%	Up to 4 years
55% to 79%	15. Schools which score 55-79% on the previous needs assessment will require a new needs assessment completed in up to 2 years. Support will be provided in intervening year on the areas	60% to 79%	Up to 3 years

	identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.		
Up to 54%	16. Schools which score below 55% on the previous needs assessment will require a new needs assessment completed in up to 1 year. Support will be provided in intervening months on the areas identified for improvement and topic specific assessments will be completed for all maintained schools and those schools purchasing the service.	59% and below	Up to 1 year

West Berkshire Council Health and Safety

Table 2

Health and Safety Service	
<p>Summary</p> <p>The aim of this service is to provide schools with a named, dedicated and professional Health and Safety Adviser to provide 'on-site support and advice' to the school, guiding and prioritising the integration of an effective and efficient safety management system and documentation in support of the School's Health and Safety Policy.</p> <p>The schools dedicated Health and Safety Adviser will begin by arranging and completing a Health and Safety Audit (Needs Assessment) of the school that will help to identify the strengths and areas for improvement in the schools existing arrangements. The Schools dedicated Health and Safety Adviser will then continue to work closely with the school to help plan, develop and implement your health and safety policy and the areas for improvement you need.</p> <p>The Management of Health and Safety at Work Regulations require you to appoint someone competent to help you meet your health and safety duties. A competent person is someone with the necessary skills, knowledge and experience to manage health and safety.</p> <p>West Berkshire Council, Schools Health and Safety Team will be your competent person and help ensure you meet your health and safety duties. Details of the Health and Safety service are listed below in further detail.</p>	
Service Provided	Service Standard
1. Advice	Advice and support will be provided to the school on specific questions/issues. If required the schools dedicated Health and Safety Adviser will arrange to visit the school and meet with relevant persons to ensure the enquiry is resolved.
2. Health and Safety Needs Assessment	<p>Schools will receive a health and safety needs assessment designed to assess and measure levels of compliance with health and safety legislation and best practice. The associated action plan will help you prioritise your improvement plan.</p> <p>Your dedicated Health and Safety Adviser will then arrange to assist and support the school in progressing the recommendations to ensure continual improvement.</p> <p>Health and Safety Needs Assessments will be completed for all maintained schools and those schools purchasing the service on a cycle subject to the outcome of the previous needs assessment as per Table 1 above.</p> <p>Schools will be able to request a new needs assessment at any time, which will be booked at the earliest mutually convenient opportunity at no additional cost to the school.</p>
3. School Safety Policy:	<p>Review existing against a model H&S Policy that is school specific, in line with the LA Safety Policy, and conforms to appropriate local and legislative requirements.</p> <p>Ensure the Policy identifies key commitments with current signature.</p> <p>Ensure that the Policy, Organisation and arrangements are carried out</p>

	and accurately reflect practice.
4. Safety Organisation:	Review and provide documentation that identifies how health and safety is/shall become 'embedded' in daily operations at the school. Identify and/or nominate key staff tasked with health and safety responsibilities.
5. Planning and implementing:	<p>Review the existing arrangements; ensure the school adequately documents the standards and procedures required for a safe place of work.</p> <p>Following written review and prioritisation of issues, help the school to progress the areas for improvement by providing support and guidance. Improvement will be achieved with the schools full commitment and involvement.</p>
6. Health and Safety Risk Assessment:	<p>Provide the school with training regarding completion of Risk Assessments.</p> <p>Provide review of the schools risk assessments on request, to support their completion.</p> <p>Provide support and guidance including a suite of generic risk assessments and guidance.</p>
7. Telephone/Incident response:	<p>Provide general telephone health and safety advice as required.</p> <p>Please note that where the topic is of a specific nature, additional time may be required for a detailed response following the initial call.</p> <p>Whilst every endeavour is made to provide an immediate answer to health and safety queries via telephone/email, requests may require additional research time.</p> <p>Should the associated risk to safety or health warrant a school visit, this shall be arranged at the request of the school.</p>
8. Health and Safety Training	<p>The Health and Safety Team run school specific health and safety courses. All health and safety training is included for all maintained schools and those schools purchasing the service.</p> <p>On-site training can also be arranged at no additional cost. Much of the training offer can now be completed by attending virtual training sessions via zoom/teams meaning costs in terms of staff availability and downtime for training are reduced.</p> <p>Pre-recorded whole school training sessions are available for some subjects free of charge to all maintained schools and those purchasing the service.</p>
9. Fire Management	<p>Schools can request a review of the schools Fire Risk Assessment (FRA) with their Health and Safety Advisor.</p> <p>Your advisor can also: Complete a site inspection to verify recommendations have been implemented. Discuss any issues outstanding and how to address these.</p> <p>Your advisor will also help review your schools evacuation plans and fire safety arrangements.</p> <p>Your advisor can also provide Fire Awareness training to school staff on request from schools.</p>
10. Asbestos Management	<p>Schools can request a site visit to complete a condition check of ACM (asbestos containing materials) with their Health and Safety Advisor.</p> <p>Your advisor can also review:</p>

	<p>The Asbestos Management Plan The Asbestos Register The Asbestos Survey</p> <p>Additionally any asbestos related risk assessment you may have in place will be reviewed to ensure it is correct and relevant.</p> <p>Your advisor can also provide tool-box talks to your staff regarding ACMs on site and highlight their responsibilities in respect of managing ACMs.</p>
11. Legionella Management	<p>Schools can request a site visit to complete a review of the legionella risk assessment with their Health and Safety Advisor.</p> <p>The advisor will also check that the school are working within the written scheme suggested and in line with the recommendations of the legionella risk assessment.</p>
12. Playground Equipment	<p>Schools can request a site visit to complete a playground equipment inspection with their Health and Safety Advisor. This will be a guided check to ensure staff are confident with what should be checked, what should be recorded and what action to take.</p> <p>We can also review the playground equipment risk assessment with the school to ensure it is suitable and sufficient.</p> <p>We can also provide on-site training and support to staff on request.</p>
13. First Aid	<p>Schools can request support and assistance to ensure the school's first aid needs assessments are in place and up to date and an appropriate number of staff are identified and trained to deliver first aid.</p>
14. Accident / Incident investigation and enforcement action	<p>Schools can request on-site support and advice from your named and dedicated Health and Safety Adviser during an accident investigation for a serious accident or enforcement action by an enforcing authority such as the Health and Safety Executive.</p>
15. Accident Reporting & Recording System	<p>The Councils Accident Reporting & Recording System is provided to all schools to allow them to record and monitor accidents/incidents.</p>
16. CHAS	<p>Assessing health and safety competence can be a lengthy process. CHAS assesses applicants: health and safety policy, their organisation for health and safety and their specific health and safety arrangements to a standard acceptable to our buyers and others. In essence, CHAS completes the initial health and safety application process for you.</p> <p>Using CHAS will help you select a competent contractor or supplier but you still need to check they are competent to carry out your project by checking they have appropriate experience and take references etc.</p>

17. School responsibilities

Whilst the duty to comply with statutory requirements cannot be delegated and remains with Schools and in some cases the Local Authority, the tasks involved with the effective implementation of health and safety management in schools is delegated to Head Teachers. For this approach to be successful, each school must do all that is reasonably practicable to ensure the health, safety and welfare of their staff, pupils and non-employees.

The operation of an effective health and safety management system at the school is central to achieving the above, with key areas being:

- The school Health and Safety Policy
- Organising for health and safety
- Planning and implementing safety controls
- Monitoring school health and safety performance
- Auditing and reviewing health and safety compliance and best practice.

Schools must also use the Council's Crest system to record accidents and incidents relating to the health and safety of their staff, pupils or visitors.

18. West Berkshire Council Schools Health and Safety Team

19. The Schools Health and Safety Team is made up of two Senior Schools Health and Safety Advisors and a Health and Safety Manager who also manages Corporate Health and Safety.

Mike Lindenburn - Health & Safety Manager

Mike has a wide range of experience in both the public and private sectors for over twenty years, providing strategic direction and operational management on health and safety. Applying initiative and practical, cost-effective solutions whenever possible. He is professional and hard working with good leadership, management and influencing skills.

Mike is a Chartered Member of the Institute of Occupational Safety and Health (CMIOSH), has a Level 5 Institute of Leadership & Management certificate in Leadership, is an Associate Member of Institute of Environmental Management and Audit (AIEMA), and has achieved (BIOH) Asbestos Specialist S301, BOHS P901 Legionella Management and completed RoSPA Operational playground inspection course.

Alice Pye - Senior Health & Safety Advisor (Schools)

Alice has over 15 years' experience of health and safety enforcement as an Environmental Health Officer. Alice has excellent organisational and communication skills and will work well with schools by building positive relationships. She is a member of the Chartered institute for Environmental Health (CIEH) and is EHRB registered, she also holds NEBOSH, (BIOH) Asbestos Specialist S301, BOHS P901 Legionella Management and has completed the RoSPA Operational playground inspection course.

Julian Routledge - Senior Health & Safety Advisor (Schools)

Julian is an experienced health and safety adviser and is able to quickly and effectively bring people together to promote a positive organisational safety culture. Julian has a good ability to successfully interact with a variety of different people and develop good relationships to provide tailored advice and support. As well as NEBOSH Julian holds (BIOH) Asbestos Specialist S301, BOHS P901 Legionella Management and has completed the RoSPA Operational playground inspection course.

To discuss any aspect of the Health & Safety Service please contact:

Key Contacts			
Name	Contact Number	Email Address	
Team Email	schoolshealthandsafety@westberks.gov.uk		
Alice Pye	07775 013072	alice.pye1@westberks.gov.uk	
Julian Routledge	07901 114623	Julian.Routledge1@westberks.gov.uk	
Mike Lindenburn	07901 114627	mike.lindenburn@westberks.gov.uk	

West Berkshire Council Maintained Schools

Legal Duty Holders for Health and Safety

England and Wales	
School type	Employer
Community schools	The local authority
Community special schools	
Voluntary controlled schools	
Maintained nursery schools	
Pupil referral units	
Foundation schools	The governing body
Foundation special schools	
Voluntary aided schools	
Independent schools	The governing body or proprietor
England	
Academies and free schools	The Academy Trust

Appendix K

Equality Impact Assessment (EqIA) - Stage One

What is the proposed decision that you are asking the Schools' Forum to make:	To agree to the areas for de-delegation as part of the Schools consultation on the funding formula
Name of Service/Directorate:	Dedicated Schools Grant
Name of assessor:	Lisa Potts
Date of assessment:	25.09.24

Is this a ?		Is this policy, strategy, function or service ... ?	
Policy	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	New or proposed	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Strategy	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Already exists and is being reviewed	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Function	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Is changing	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Service	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		

(1) What are the main aims, objectives and intended outcomes of the proposed decision and who is likely to benefit from it?	
Aims:	To agree the areas of schools budget to de-delegate
Objectives:	To ensure services continue to be funded
Outcomes:	Agreement to de-delegate services as set out in the papers
Benefits:	A deliverable service

(2) Which groups might be affected and how? Is it positively or negatively and what sources of information have been used to determine this?		
<i>(Please demonstrate consideration of all strands – Age, Disability, Gender Reassignment, Marriage and Civil Partnership, Pregnancy and Maternity, Race, Religion or Belief, Sex and Sexual Orientation)</i>		
Group Affected	What might be the effect?	Information to support this
Age	n/a	
Disability	n/a	
Gender Reassignment	n/a	
Marriage and Civil Partnership	n/a	

Pregnancy and Maternity	n/a	
Race	n/a	
Religion or Belief	n/a	
Sex	n/a	
Sexual Orientation	n/a	
Further Comments:		

(3) Result	
Are there any aspects of the proposed decision, including how it is delivered or accessed, that could contribute to inequality?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	
Will the proposed decision have an adverse impact upon the lives of people, including employees and service users?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	

If your answers to question 2 have identified potential adverse impacts and you have answered ‘yes’ to either of the sections at question 3, or you are unsure about the impact, then you should carry out a EqlA 2.

If an EqlA 2 is required, before proceeding you should discuss the scope of the Assessment with service managers in your area. You will also need to refer to the EqlA guidance and template – <http://intranet/index.aspx?articleid=32255>

(4) Identify next steps as appropriate:	
EqlA Stage 2 required	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Owner of EqlA Stage Two:	
Timescale for EqlA Stage Two:	

Name: Lisa Potts

Date: 25/09/2024

Please now forward this completed form to Pamela Voss, Equality and Diversity Officer (pamela.voss@westberks.gov.uk), for publication on the WBC website.

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Transtions Support Programme - Staff co-funding request

Report being considered by: Schools' Forum on 14th October 2024

Report Author: Hester Collicut, DBV Programme Manager

Item for: Decision **By:** All Forum Members

1. Purpose of the Report

1.1 The report will outline the progress that has been made in relation to the Transitions Support Programme as part of the Delivering Better Value Programme and outlines rationale for match funding request.

2. Recommendation

2.1 The report will detail the request for match funding of two transition support Programme posts that have been identified as necessary for the sustained delivery of this pilot initiative for one year.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: <input checked="" type="checkbox"/>	No: <input type="checkbox"/>

3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
	A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?	X		

<p>B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?</p>	x			<p>The purpose of the DBV Programme is improve outcomes for children and young people with SEND by improving timely access to services, interventions, and appropriate levels of funding.</p>
<p>Data Impact:</p>				<p>NO</p>
<p>Consultation and Engagement:</p>	<p>Key system partners are members of the SEND Strategic Improvement Board and Implementation/ Task groups.</p> <p>School representation on Task Groups provide operational input and regular updates are provided to Schools' Forum and the Heads Funding Group.</p> <p>The Parent Carer Forum is re-established and a representative sits on the SEND Strategic Improvement Board and DBV Task Group and is supported by the Participation and Engagement Manager and Strategy Officer.</p> <p>West Berkshire has sought to work with children, families, and Local Area partners throughout the DBV Programme. It is important to note that the Parent Carer Forum and Youth Forum have recently been reformed and are in the early stages of activity.</p> <p>A Communications Plan has been launched to support the delivery of the DBV Programme and ensure wider engagement with all sectors of the community.</p>			

4. Introduction/Background

- 4.1 The Delivering Better Value Programme (DBV) identified that children with SEND at points of transition (either primary to secondary, or early years children with SEND entering Reception) are at higher risk of not accessing mainstream provision. Some parents and carers do not have confidence in mainstream to meet need, resulting in significant requests for statutory assessment, or requests -for children with an EHCP- for specialist placements, at point of transition.
- 4.2 The Transitions Support Programme, co-produced with schools, is a key element of the DBV Programme. The objectives of the programme are to:
- a) Provide additional co-produced advice and guidance to schools and settings to support children with SEND at points of transition between phases of education, focusing initially on entry into Reception and again between primary and secondary phases.
 - b) Guidance, co-produced with parents and carers, to support families through phase transition stages.

- c) Identify vulnerable cohorts in Early Years and in Year 6 who would benefit from additional targeted support into mainstream placements at the next phase of education.
- d) Reduce the demand for EHC assessments at points of transition by early identification of need and targeting of appropriate provision.
- e) Reduce the demand for independent non maintained special school placements (INMSS) by building parental confidence in the mainstream system to meet need, and thus reducing the pressure on the High Needs Block, supported through the deficit management plan.

5. Supporting Information

5.1 The Newton Europe DBV analysis in December 2023 identified significant cost savings if needs could be met in mainstream rather than in specialist (MSS) or independent non-maintained special school provision (INMSS).

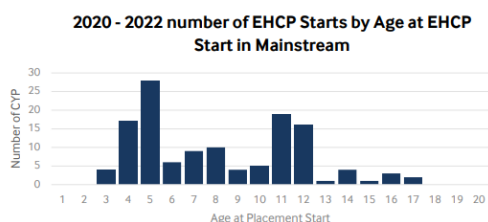
Opportunity	Number of Starts per year	Proportion of CYP affected	Average Duration of Placement	Average cost difference of change (HNB)	Confidence Weightings	Annual, Full Run Rate Cost Avoidance Range
Supporting the goals and aspirations of the child in a Mainstream setting rather than MSS	40 New starts in MSS	34% (14 CYP)	12.6 Years	£27,382 (MSS – Mainstream)	50% - 60% (7 – 8 CYP)	£2.3M - £2.7M
Supporting the goals and aspirations of the child in a Mainstream setting rather than INMSS	10 New starts in INMSS	40% (4 CYP)	6.3 Years	£73,675 (INMSS – Mainstream)	75% - 100% (3 – 4 CYP)	£1.4M - £1.9M

5.2 Newton Europe identified the majority of children and young people with new EHC plans start their provision in mainstream during the primary transition years and secondary transition years.

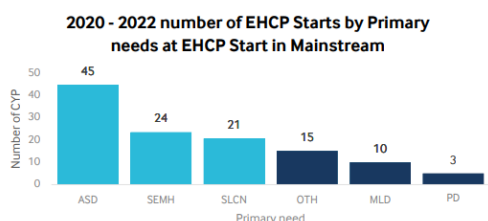
Mainstream Deep Dive: ASD, SEMH and SLCN account for the primary needs of over two-thirds of new Mainstream starts



Mainstream



The majority of CYP with EHCPs start their provision at Mainstream during the primary transition years and secondary transition years, i.e., ages 4-5 and 11-12. These two groups account for 62% of the new-starts cohort.



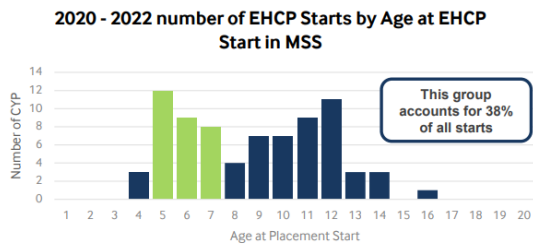
Among all Mainstream starts, ASD, SEMH and SLCN are the main primary needs, accounting for 69% of all starts.

5.3 A high number of children and young people with new EHC plans start in maintained special schools during primary and secondary transition years. These age groups contribute 64% of the MSS new starts cohort.

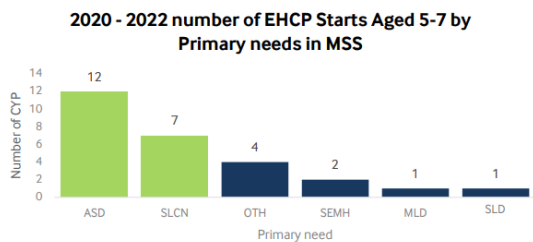
MSS Deep Dive: Two out of three MSS new starts aged 5-7 have ASD or SLCN as the main primary need



MSS



A high number of CYP new starts in MSS during the primary and secondary transition years, i.e., ages 5-7 and ages 11-12. These age groups contribute to 64% of the MSS new starts cohort.



66% of CYP who start in MSS aged 5-7 have ASD and SLCN as the main primary needs.

ASD and SLCN are the most common primary needs amongst starts in the primary transition years in MSS, with this cohort alone accounting for half of all MSS starts with SLCN. By focusing on this cohort of starts, case reviews can understand the needs of a quarter of all starts in MSS and determine whether it's possible to support these CYP in a Mainstream setting.

Sources: Analysis of CYP Data

- 5.4 Co-produced transitions guidance for 6/7 transfer and early years/reception for schools and setting will be published in October 2024.
- 5.5 Co-produced guidance for parents will be developed in the Autumn Term 2024.
- 5.6 The DBV funded Transitions Support Programme Summer Term 2024 supported Early Years transition into Foundation 2, for September 2024. This will be continued into the Autumn Term 2024 to ensure vulnerable children are successfully supported into their mainstream placement. It is expected that it will build the confidence of receiving schools in their ability to meet need.
- 5.7 Approximately 50 Year 6 pupils have been identified who are vulnerable to risk of a failed transition and may require specialist placement. These have been identified by our LA advisory services – Autism Team, Cognition and Learning Team, EBSA, EPS, Exclusions and Therapeutic Approaches.
 - 23 of these pupils have EHCPs
 - 25 are at SEND support
 - 27 have Communication and Interaction as their primary SEN
 - 15 have Social, Emotional and Mental Health difficulties as their primary SEN
- 5.8 A DBV funded post is being recruited to support complex annual reviews for those at point of transition to ensure that parental concerns are addressed in a timely fashion.

6. Options for Consideration

- 6.1 It is proposed that two additional one-year FT posts are match funded (50/50) through Schools Forum to support the piloting of the Transitions Programme.

6.2 Post 1: Additional HLTA in the Autism Team to support transition (1 FTE)

From 1st January 2025 to 31 Dec 2025

Cost of staffing- £35840 (est 25/26)

Cost of a Laptop and phone - £1,000

Rough idea of travel expenses - £800

Total – £37,640- 50/50 split- cost to Schools Forum: £18820

Brief overview of this role:

To support transition for the identified pupils who at risk of placement breakdown in mainstream. This would include preparation work in year 6 and support into the first term of year 7. Support is likely to be in the areas of:

- Emotional Regulation
- Reducing anxiety
- Exploring the environment and triggers – unpicking those that cause anxiety
- Developing self-esteem

It would also include training for schools and supporting them to help with transition for autistic pupils.

6.4 Post 2 – SEMH Practitioner to support transition (1 FTE)

From 1st Jan 2025 to 31st December 2025

Cost of Staffing - £45890 (est 25/26)

Cost of a Laptop and phone - £1,000

Rough idea of travel expenses - £800

Total – £47,690- 50/50 split- cost to Schools Forum: £23,845

Brief overview of this role:

- To use an adaptable approach to support individuals who are at risk or currently have a number of exclusions with concerns of PEX.
- Offering 1:1 weekly session to unpick behaviour, explore feelings and views on what is and isn't going well in school, providing strategies for support and emotional regulation through play and interventions.
- Provide feedback to school to implement a bespoke support plan.

7. Proposals

- 7.1 The request to Schools Forum is a total of **£42,665** from 1st January 2025 to 31 December 2025 to provide match funding to the Transitions Programme Pilot. The impact of the pilot shall be evaluated termly throughout the programme and reported to Schools Forum in the Autumn Term 2025.

8. Conclusion

- 8.1 If the pilot proves successful in transitioning more children with SEND successfully into their next mainstream provision and thereby supports the Deficit Management Plan for the High Needs Block, consideration should be made to continue the Transitions Programme into the following years with associated funding requests to ensure its sustainability and longevity through an “invest to save” programme.

9. Appendices

Appendix A – Equalities Impact Assessment – Stage 1

Appendix A

Equality Impact Assessment (EqIA) - Stage One

What is the proposed decision that you are asking the Schools' Forum to make:	Match Funding For Transitions Support Programme
Name of Service/Directorate:	Education
Name of assessor:	Susan Tanner
Date of assessment:	September 2024

Is this a ?		Is this policy, strategy, function or service ... ?	
Policy	Yes <input type="checkbox"/> No <input type="checkbox"/>	New or proposed	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Strategy	Yes <input type="checkbox"/> No <input type="checkbox"/>	Already exists and is being reviewed	Yes <input type="checkbox"/> No <input type="checkbox"/>
Function	Yes <input type="checkbox"/> No <input type="checkbox"/>	Is changing	Yes <input type="checkbox"/> No <input type="checkbox"/>
Service	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>		

(1) What are the main aims, objectives and intended outcomes of the proposed decision and who is likely to benefit from it?	
Aims:	Support children Transitioning from primary to secondary mainstream schools identified by LA Support Services as having SEND with additional needs that may impact negatively on transition experiences.
Objectives:	Support identified SEND children in Year 6 into secondary mainstream placements.
Outcomes:	Successful Transition into secondary mainstream schools with identified pupils with SEND
Benefits:	<ul style="list-style-type: none"> • Meeting SEND in local mainstream provision • Reduction in placements in maintained special schools and independent non maintained special schools with associated higher costs,

(2) Which groups might be affected and how? Is it positively or negatively and what sources of information have been used to determine this?		
Group Affected	What might be the effect?	Information to support this
Age	10-11	Transition Support Programme Pilot - DBV

Disability	SEND identified in Code of Practice 2015 at SEND Support or with an EHC plan	SEND Code of Practice 2015
Gender Reassignment	N/A	
Marriage and Civil Partnership	N/A	
Pregnancy and Maternity	N/A	
Race	N/A	
Religion or Belief	N/A	
Sex	N/A	
Sexual Orientation	N/A	
Further Comments:		

(3) Result	
Are there any aspects of the proposed decision, including how it is delivered or accessed, that could contribute to inequality?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	
Will the proposed decision have an adverse impact upon the lives of people, including employees and service users?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	

(4) Identify next steps as appropriate:	
EqlA Stage 2 required	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Owner of EqlA Stage Two:	
Timescale for EqlA Stage Two:	

Name: Susan Tanner

Date: September 2024

Clawback of Surplus Balances

Report being considered by: School's Forum2024
Report Author: Neil Goddard / Melanie Ellis
Item for: Decision **By:** All Maintained Schools Representatives

1. Purpose of the Report

- 1.1 This report updates School's Forum on the outcomes of the review of the proposed clawback of excessive balances in relation to the 2023/24 financial year end.
- 1.2 This review was established in response to concerns raised by schools that there had been insufficient time allowed for a fully evidenced assessment of the level of uncommitted reserves that were held by each school.
- 1.3 This report sets out the process that was followed in undertaking the review, and the outcomes that are now proposed to the Schools Forum for consideration
- 1.4 The revised amount that is proposed to be clawed back from schools has reduced from £2,855,480 to £1,518,292.

2. Recommendations

- 2.1 School's Forum considers the process and outcomes of the review and approves the clawbacks as per the Local Authority's revised proposals

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?

Yes: x

No:

3. Implications and Impact Assessment

Equalities Impact:				Commentary
	Positive	No Impact	Negative	

Clawback of Surplus Balances

A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x		
B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
Data Impact:		x		
Consultation and Engagement:	Heads Funding Group, all schools.			

4. Background

4.1 The DfE Scheme for Financing Schools says the following:

Any mechanism should have regard to the principle that schools should be moving towards greater autonomy, should not be constrained from making early efficiencies to support their medium-term budgeting in a tighter financial climate, and should not be burdened by bureaucracy.

The mechanism should, therefore, be focused on only those schools which have built up significant excessive uncommitted balances or where some level of redistribution would support improved provision across a local area.

4.2 It is sound financial management for maintained schools to plan their budgets over more than one year and to be given the flexibility to manage their finances and retain a reserve from year to year. The Scheme for Financing Schools requires that schools must submit a three-year budget each year. This enables schools to:

- (1) Progress capital works where capital resources are insufficient,
- (2) Progress 'spend to save' strategies,
- (3) Support costs associated with expanding or reducing pupil numbers,
- (4) Support reducing funding or increasing costs or manage exceptional circumstances to avoid an impact on standards at the school.

4.3 However, this should only be if the Governing Body has made deliberate decisions to allocate revenue funding for these purposes with a clear timescale for spending, and

Clawback of Surplus Balances

that these decisions do not impact the maximising of in-year spending on the school's key priorities.

- 4.4 This must be balanced against the Local Authority duty to maximise the spending of resources, targeted correctly, to improve outcomes for children and young people.
- 4.5 A clawback mechanism is important in enabling the Local Authority, with the Schools Forum, to redistribute funding that is not being used by schools.
- 4.6 In November 2023 School's Forum approved the updated West Berkshire Scheme for Financing Schools. This included provision for maintained schools with year end uncommitted balances of over 10% of their annual revenue funding to be subject to a clawback. The clawback amount would be equal to the amount on the balance over the 10% threshold, where this did not reduce the remaining balance below £50k.
- 4.7 At this time, it was agreed that the first clawback would be made following the closure of the 2024/2025 financial year accounts.
- 4.8 In May 2024, having received maintained school's 2023/24 year end position, and 2024/25 three year budget plans, the Council was of the view that it may be appropriate to ask the Secretary of State to review the Forum's decision, and to request the implementation date be brought forward to the 2023/24 financial year. This view was informed by the ongoing high levels of balances being held in some schools.
- 4.9 When presented with this position, Heads Funding Group (HFG) agreed that the previous decision should be revisited by School's Forum, rather than being referred to DfE. At its June meeting the Forum decided to bring forward the implementation of the clawback as proposed by the Council.
- 4.10 The Council engaged with all schools that had a surplus of a size that may be the subject of a clawback, in line with the agreed Scheme for Financing Schools. This data was then analysed to identify proposed levels of clawback where appropriate. This data was then presented to HFG and Schools Forum where the proposals were ratified, and clawback values agreed. This process was completed before the end of July to provide schools with certainty around budgets moving into the new school year.
- 4.11 Having received the decisions of the School's Forum, a number for schools who were subject to clawback raised concerns about the process, in particular the speed at which this has been completed, and the level of input they had been able to have to evidence balances which were committed to specific future expenditure.
- 4.12 The Council took the decision to pause any clawback of funds and undertake a review of the decision making process. As this would be over the summer period, the end date was set as 11th September to allow schools to fully engage. The review would offer schools the opportunity to provide further information about any balances that they felt should be treated as committed. In support of this, schools were offered the opportunity to meet with the Leader of the Council, the Portfolio Holder for Children's Services and the Service Director Education and SEND. Many schools took up this offer and this provided a helpful forum to develop shared

Clawback of Surplus Balances

understanding of how balances had been accrued, and the commitments that maybe set against these.

- 4.13 The further information provided by schools was reviewed by a panel of officers made up of the Audit Manager (Head of Internal Audit), Service Director Education and SEND and Service Lead - Financial Management, Revenues & Benefits. The outcomes of this review are presented in this report.

5. Proposals

- 5.1 The following is a summary of the outcome of the review process of each school, including, where appropriate the revised level of clawback proposed.

School	Original Recommendation	Revised Recommendation	Reason for Change
Victoria Park Nursery	-11,943	0	Budgeted contribution towards roof repair capital project
Beeton C of E Primary	0	0	None
Chaddleworth St. Andrew's & Shefford Church of England Federated Primary	-4,592	0	Budgeted investment in Nurture Unit and safeguarding
Curridge Primary	-5,583	-5,583	None
Garland Junior	0	0	None
John Rankin Federation	-103,042	0	Budgeted contribution of capital works and one off staffing costs
Parsons Down Partnership	-83,489	0	Budgeted Contribution to capital works
Springfield Primary	-137,204	0	Budgeted contribution to capital works delayed by drainage issues
Downs	-490,453	0	Agreed transfer to capital delayed due to contractual issues
Brookfields	-2,019,174	-1,512,709	Budgeted investment in building and support for high need pupils
Castle School / Castle at Theale	0	0	Budgeted contribution to capital works
iCollege	0	0	Out of scope due to nature of AP funding
	-2,855,480	-1,518,292	

- 5.2 The review was based on the additional information provided by schools. Through this process additional committed expenditure was identified that reduced the level of clawback. The majority of this related to capital projects that were planned but not yet being delivered.
- 5.3 Two schools had been identified as potentially subject to clawback, but not included in the original report to HFG. The review identified committed expenditure that meant no clawback was required from Castle School / Castle at Theale. In the case of iCollege the review found that, due to the nature of Alternative Provision funding, which is significantly more volatile than formulaically funded schools, clawback would not be appropriate and so the school should be excluded from this process in future.
- 5.4 Based on the outcomes of the review process, the council recommends a total clawback of £1,518,292 as set out above. This full amount to be transferred to the High Needs Block to support pupils with additional needs.
- 5.5 Head's Funding Group reviewed these proposals on 2nd October 2024 and supported the proposals as set out on this report.

Equality Impact Assessment (EqIA) - Stage One

We need to ensure that our strategies, policies, functions and services, current and proposed have given due regard to equality and diversity as set out in the Public Sector Equality Duty (section 149 of the Equality Act 2010), which states:

- (1) A public authority must, in the exercise of its functions, have due regard to the need to:
 - (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;*
 - (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; This includes the need to:
 - (i) remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;*
 - (ii) take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;**
 - (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it, with due regard, in particular, to the need to be aware that compliance with the duties in this section may involve treating some persons more favourably than others.**
- (2) The steps involved in meeting the needs of disabled persons that are different from the needs of persons who are not disabled include, in particular, steps to take account of disabled persons' disabilities.*
- (3) Compliance with the duties in this section may involve treating some persons more favourably than others.*

The following list of questions may help to establish whether the decision is relevant to equality (the relevance of a decision to equality depends not just on the number of those affected, but on the significance of the impact on them):

- Does the decision affect service users, employees or the wider community?

Clawback of Surplus Balances

- Is it likely to affect people with particular protected characteristics differently?
- Is it a major policy or a major change to an existing policy, significantly affecting how functions are delivered?
- Will the decision have a significant impact on how other organisations operate in terms of equality?
- Does the decision relate to functions that engagement has identified as being important to people with particular protected characteristics?
- Does the decision relate to an area with known inequalities?
- Does the decision relate to any equality objectives that have been set by the Council?

Please complete the following questions to determine whether a full Stage Two, Equality Impact Assessment is required.

What is the proposed decision that you are asking the Schools' Forum to make:	Agree amount of surplus balance to clawback
Name of Service/Directorate:	Finance and Property/Resources
Name of assessor:	Melanie Ellis
Date of assessment:	25.6.24

Is this a ?		Is this policy, strategy, function or service ... ?	
Policy	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	New or proposed	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Strategy	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Already exists and is being reviewed	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Function	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Is changing	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Service	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		

(1) What are the main aims, objectives and intended outcomes of the proposed decision and who is likely to benefit from it?	
Aims:	To agree the amount of surplus balance to claw back
Objectives:	To comply with Scheme for Financing Schools
Outcomes:	To clawback funds to put to the high needs block
Benefits:	To reduce the deficit on the high needs block

(2) Which groups might be affected and how? Is it positively or negatively and what sources of information have been used to determine this?

(Please demonstrate consideration of all strands – Age, Disability, Gender Reassignment, Marriage and Civil Partnership, Pregnancy and Maternity, Race, Religion or Belief, Sex and Sexual Orientation)

Clawback of Surplus Balances

Group Affected	Potential Positive Impacts	Potential Negative Impacts	Evidence
Age	none	none	
Disability	none	none	
Gender Reassignment	none	none	
Marriage and Civil Partnership	none	none	
Pregnancy and Maternity	none	none	
Race	none	none	
Religion or Belief	none	none	
Sex	none	none	
Sexual Orientation	none	none	
Further Comments:			

(3) Result	
Are there any aspects of the proposed decision, including how it is delivered or accessed, that could contribute to inequality?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	
Will the proposed decision have an adverse impact upon the lives of people, including employees and service users?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Please provide an explanation for your answer:	

If your answers to question 2 have identified potential adverse impacts and you have answered ‘yes’ to either of the sections at question 3, or you are unsure about the impact, then you should carry out a EqIA 2.

If an EqIA 2 is required, before proceeding you should discuss the scope of the Assessment with service managers in your area. You will also need to refer to the EqIA guidance and template – <http://intranet/index.aspx?articleid=32255>.

(4) Identify next steps as appropriate:	
EqIA Stage 2 required	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

Clawback of Surplus Balances

Owner of EqIA Stage Two:	
Timescale for EqIA Stage Two:	

Name: Melanie Ellis

Date: 25.06.24

Please now forward this completed form to Pamela Voss, Equality and Diversity Officer (pamela.voss@westberks.gov.uk), for publication o

Delivering Better Value : September 2024 Update

Report being considered by: Schools' Forum on 14th October 2024

Report Author: Susan Tanner, Service Director, Delivering Better Value (DBV)
Hester Collicut, DBV Programme Manager

Item for: Information **By:** All Forum Members

1. Purpose of the Report

- 1.1 This report provides an update on the Delivering Better Value Programme (DBV) and its impact on the SEND system in West Berkshire to the Heads Funding Group.
- 1.2 The report is updated regularly so that Heads Funding Group is informed of progress in the delivery of the programme, its impact in improving outcomes for children and young people with Special Educational Needs/Disabilities, and the programme’s contribution to successfully reducing the High Needs Block deficit by transforming the delivery of SEND support in West Berkshire.

2. Recommendation

- 2.1 It is recommended that Heads’ Funding Group and Schools’ Forum notes the progress made.

Is the Schools’ Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>

3. Introduction/Background

- 3.1 The Delivering Better Value (DBV) Programme is beginning to have an impact on the outcomes for children and young people with SEND (in the longer term this will impact the overarching Deficit Management Plan to reduce spend of the High Needs Block) ensuring a sustainable service delivery for SEND provision in West Berkshire.
- 3.2 This is a transformation programme that will support systems reviews of SEND activities and ensure that SEND Commissioning is effective in meeting the current and future demands of the local population, and in doing so, improve long term outcomes for children and young people with SEND. The DBV programme provides the first year’s focus of activities to address the six propriety areas of the SEND and Inclusion Strategy 2024-29, “Innovation in SEND”.

- 3.3 This paper highlights progress being made towards this, and in addition, the current risks to delivery and the mitigations in place.
- 3.4 Next steps and challenges are identified in section 4.19 to 4.23. If there is a delay in implementation of the DBV Programme, then there will be an impact on the High Need Block Deficit Management Plan.

4. Supporting Information

Introduction

- 4.1 This report outlines the progress of the DBV Programme since confirmation of funding from the Department for Education (DfE) in April 2024

Background/ Progress to date

- 4.2 Since April the DBV Programme and its governance has become fully aligned and incorporated into the new SEND and Inclusion Strategy 2024- 29 to ensure the overarching delivery of the “Innovation in SEND” programme in West Berkshire.
- 4.3 West Berkshire is required to provide formal quarterly progress update to the DfE. The quarterly reporting cycle to the DfE is as follows: -
- April to June by 5th July – submitted and approved by the DfE.
 - July to Sept by 4th October
 - October to December by 10th January
 - January to March by 4th April
- 4.4 The four working groups of the DBV Programme meet monthly during term time and tasks have been instigated according to the DBV Programme Plan and incorporated into the SEND and Inclusion Strategy Delivery Plan 2024-2029.
- 4.5 The Parent and Carer Forum is engaged at a strategic level, sitting on the SEND Strategic Improvement Board (SSIB) which is chaired by the Executive Director of Children’s Services, and whose membership includes the Chief Executive for West Berkshire, the Lead Member for Children’s Services and Education, Chief Nursing Officer for the ICB and the ICB Place Director (Berkshire, Oxfordshire, and Buckinghamshire -BOB).
- 4.6 To further support communication with parents and carers, West Berkshire has invested in the Coram Parent Champion Programme. The Parent Champion programme extends our ability to engage with parents and carers during the remaining months of the DBV programme supporting the Gap Analysis /SEND Local Offer and the Inclusive Practice workstreams.
- 4.7 A SEND Strategic Communications Plan has now been adopted. It encompasses both work under the DBV Programme and the wider SEND and Inclusion Strategy under the collective strapline: “Innovation in SEND”. The draft Communications Plan

includes an 'Innovation in SEND' blog / web page where we host all updates on DBV.

- 4.8 DBV working groups meet monthly in term time to scrutinise the delivery of the programme and regular reports are submitted to Schools Forum and Heads Funding Group.
- 4.9 Key temporary posts have been filled to manage the delivery of the programme, increasing the capacity of the existing teams whilst system changes are implemented. However, some recruitment has been more difficult and has caused delay e.g. the "Whole School Mental Health Project" where the project has been delayed by 5-6 months. The DfE has agreed DBV grant funding can be used beyond 31 March 2025 until July 2025 on delayed projects.
- 4.10 The "Whole School Mental Health Project" has been redesigned as it was reliant on Educational Psychologists (EPs) to deliver the programme. Due to retention challenges Educational Psychology time is limited and must be prioritised in other areas. A revised, evidenced based programme has been commissioned from an external provider. The delivery of the programme will be led by the Virtual School Team who will work closely with 10 schools to develop a pilot. The pilot, if successful, can be expanded and will complement the current provision available for schools. In addition, all mainstream schools will have access to an online learning platform to support Mental Health identification and good practice.
- 4.11 The Transitions Support Programme Summer Term 2024 supported Early Years transition into Foundation 2, for September 2024. This will be continued into the Autumn Term 2024 to ensure vulnerable children are successfully supported into their mainstream placement. It is expected that it will build the confidence of receiving schools in their ability to meet need. An Early Years Transitions Guidance into mainstream schools will be published in the Autumn.
- 4.12 The Key Stage 2/3 Transitions Programme has been co-produced with schools (Primary and Secondary SENCos and Year 7 teachers). A West Berkshire Schools' Guidance for a Successful Primary to Secondary Transition will be published in October 2024. This is a good practice guide for schools to adopt when supporting transitions for vulnerable children moving between primary and secondary mainstream.
- 4.13 Pupil level data has been reviewed to enable the identification of mainstream Year 6 pupils most likely to require additional support at transition. Targeted interventions will be available for these children to ensure as many as possible successfully transition into their secondary mainstream school.
- 4.14 The first months of the DBV Programme have focused on ensuring systems are in place to drive sustainable, evidenced based improvements in supporting children and young people with SEND, delivering cost effective solutions that meet SEND needs locally and that are co-produced with local partners and families. Work on SEND Data Management has informed the development of a Sufficiency Plan, data dashboards and a clearer financial overview of placements in Independent non-maintained special schools (INMSS). This is bringing together teams from within the

Council to align their work and is informing sufficiency, financial scrutiny, and commissioning developments. This will be an area of focus over the coming months.

- 4.15 Phase 1 of a SEND funding review focussing on levels of funding available for children and young with SEND was completed at the end of August 2024. This was a desk top exercise to understand and benchmark current practices. Phase 2 will commence in September and will establish a working group of school leaders and Local Authority officers to co-develop a revised funding system. The working group will develop:
- A shared understanding of the range and levels of needs across West Berkshire settings and schools and how that compares with other areas.
 - A clear and consistent graduated approach to meeting needs across the local area.
 - A transparent and equitable system of SEND funding and resource allocation across West Berkshire.
 - Identification and development of changes to the current SEND system.
 - Improvement in the quality and clarity of EHCPs.
 - Evidencing the impact of resourcing on children and young people's outcomes.
- 4.16 A review of statutory decision-making processes has been undertaken to ensure transparency, consistency, and value for money. Any changes in process will be managed through consultation and updated on the local offer. A High-Cost Placement Review has been undertaken and is informing work around joint decision making in relation to Social Care, Education and Health Placements.
- 4.17 A cross-agency gap analysis has been completed in relation to the Universal and Targeted Offer in West Berkshire in conjunction with health colleagues – e.g. review of the support available around Autism, pre and post diagnosis. “A plan on a page” for available services will be published on the Local Offer. This is in response to issues raised by parents and practitioners regarding clarity of support available and referral pathways published on the Local Offer. Gaps in offers are being identified and will be commissioned or co-commissioned as necessary. The Local Offer will be updated to reflect these developments. However the changing of the Local Offer platform and the limited resourcing of Local Offer administration may delay this.
- 4.18 An audit of schools’ training needs has been undertaken and an evaluation of current LA support services is being completed to ensure evidence-based impact can be demonstrated.

Next Steps

- 4.19 Through a review of SEND systems, it is evident that there is reduced capacity in the SEND Team to undertake timely Annual Reviews or prioritise Annual Reviews at

points of transfer. The absence of annual reviews does not meet statutory requirements and directly impacts on children's and young people's outcomes, placement requests, tribunal outcomes and demand for high-cost Independent non-maintained placements. A business case will be submitted for additional resources to support the business-as-usual processing of Annual Reviews.

- 4.20 The Local Offer needs updating and ongoing monitoring to ensure that it continues to meet service user requirements. Current resourcing is not adequate to address this in a timely fashion. It is hoped that DBV grant can be used to provide some additional resource in the interim, whilst as assessment is made of the longer-term requirement for additional resource.

Challenges

- 4.21 Co-production is at the centre of this programme; however, the Parent Carer Forum consists of very few parents and therefore continues to have very limited capacity to engage with the DBV programme. However, through the work with Coram Parent Champion Programme, a wider group of parents and carers is being engaged.
- 4.22 Relationships with some schools have been more challenging whilst the "claw back" process for excess balances is being reviewed. Restoring and reinforcing these relationships will be a priority for officers in Autumn 2024 to ensure schools feel supported whilst undergoing Part 2 of the Banding Review. This will be co-produced with school heads and senior management, which will support understanding and engagement as we move forward with the process.
- 4.23 Significant staff changes in the SEND Team have added additional capacity pressures in the service. A restructure is scheduled and there are arrangements in place to ensure limited disruption in line management etc. whilst the review is being undertaken.

5. Options for Consideration

- 5.1 No other options are currently being considered at this time.

6. Conclusion

- 6.1 The DBV Programme is proceeding at pace and is broadly in line with the delivery schedule, but the anticipated risks will impact on delivery time and the Programme may run beyond March 2025 in certain areas, with DfE agreement.

7. Appendices

NONE

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Update on Safety Valve Programme – Sept 2024

Report being considered by: Schools' Forum on 14th October 2024

Report Author: Hester Collicut

Item for: Information **By:** All Forum Members

1. Purpose of the Report

- 1.1 To provide the most up to date information on relation to the Safety Valve Programme.
- 1.2 The report was discussed at the last meeting of the Heads' Funding Group and is brought to the Schools' Forum for information. The Heads' Funding Group agreed that updates on the Safety Valve Programme should be limited to when there are significant changes or amendments to the Programme.

2. Recommendation

- 2.1 The Schools' Forum note the report.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: <input type="checkbox"/>	No: <input checked="" type="checkbox"/>

3. Introduction/Background

- 3.1 In February 2024, Head Funding Group requested regular updates on the National Safety Valve Programme and the Local Authorities involved. Since then, a General Election and change of government has occurred. This paper will provide an update as to the current situation with the Safety Valve Programme as of September 2024.

4. Supporting Information

- 4.1 As of July 2024, there are 38 local authorities currently in the Safety Valve programme.
- 4.2 Before the general election, the DfE appeared to be satisfied with the progress of Safety Valve. In May 2024, the DfE's Permanent Secretary told the previous House of Commons Public Accounts Committee the department was "seeing some really good progress from councils" with Safety Valve and its lighter-touch financial intervention companion, Delivering Better Value in SEND.

Update on Safety Valve Programme – Sept 2024

- 4.3 Currently the Safety Valve Programme remains in place. As reported in SEND Jungle – July 2024:-

“We don’t know how many LAs might be invited to join Safety Valve this year, but it’s unlikely to be more than a few and not every LA invited will necessarily choose to join. If the new government decides that none will join, then none will join. And after 2024-25, any decisions made will follow a cross-government Spending Review.”

5. Proposals

- 5.1 That the Schools’ Forum note the report. Going forward updates will be limited to when there are significant changes or amendments to the Programme.

6. Appendices

NONE

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Dedicated Schools Grant Monitoring Report 2024/25 – Quarter Two

Report being considered by: Schools Forum on 14th October 2024

Report Author: Lisa Potts

Item for: Information **By:** All Forum Members

1. Purpose of the Report

1.1 To report the forecast financial position of the services funded by the Dedicated Schools Grant (DSG), highlighting any under or over spends, and to highlight the cumulative deficit on the DSG

2. Recommendation

2.1 1.1 That the report be noted.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?

Yes:

No:

3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x		

B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		x		
Data Impact:		x		
Consultation and Engagement:				

4. Introduction/Background

- 4.1 The Dedicated Schools Grant (DSG) is a ring fenced specific grant which can only be spent on school/pupil activity as set out in The School and Early Years Finance (England) Regulations 2024. The Local Authority and Schools' Forum are responsible for ensuring that the DSG is deployed correctly according to the Regulations. Monitoring of spend against the grant needs to take place regularly to enable decision making on over spends/under spends and to inform future year budget requirements.
- 4.2 There are four DSG funding blocks: Schools Block, High Needs Block, Early Years Block and Central Schools Services Block. The funding for each of the four blocks is determined by a national funding formula.

5. Supporting Information

- 5.1 The 2024/25 Dedicated Schools Grant allocation is £181.9m. This includes £57m which funds Academies and post-16 high needs places which is paid direct by the Education and Skills Funding Agency (ESFA) to schools. The DSG budget for 2024/25 has been built utilising the remaining grant.
- 5.2 The Schools block is ring fenced but the Local Authority can transfer up to 0.5% of the funding out of the schools block with Schools Forum agreement. The other blocks are not subject to this limitation on transfers. For the 2024/25 budget, Schools Forum agreed to transfer 0.25% of the Schools Block funding to the High Needs Block amounting to £335k.
- 5.3 The DSG expenditure budgets required for 2024/25 total £133.7m, which is £7.9m more than the funding available. As a result, a £7.9m in-year efficiency target has been set against this in order to balance the DSG budget, against the High Needs Block
- 5.4 There is a brought forward deficit on the DSG of £9.45m.

5.5 The forecast position at the end of September is shown in Table 1. A more detailed position per cost centre is shown in Appendix A.

Prior Years			2024/25						
2021/22 Outturn	2022/23 Outturn	2023/24 Outturn	Table 1 - DSG Block forecast 2024/25	Original Budget	Budget Changes	Final Budget	Quarter 1 Forecast	Quarter 2 Forecast	Deficit/ (surplus)
£'000	£'000	£'000		£'000	£'000	£'000	£'000	£'000	£'000
			Expenditure:						
70,512	73,090	77,070	Schools Block (inc ISB)	79,518	0	79,518	79,518	79,518	0
9,899	10,240	11,325	Early Years Block	17,371	0	17,371	17,329	17,329	(42)
1,001	967	935	Central School Services Block	961	0	961	974	982	21
23,827	26,456	31,157	High Needs Block	35,823	0	35,823	34,927	35,942	119
0	0	0	High Needs Block In-Year deficit recovery	(7,881)	0	(7,881)	0	0	7,881
105,240	110,754	120,487	Total Expenditure	125,793	0	125,793	132,747	133,771	7,979
			DSG Grant Income:						
(70,293)	(72,937)	(77,005)	Schools Block	(79,518)	0	(79,518)	(79,518)	(79,518)	0
(9,834)	(10,102)	(11,115)	Early Years Block	(17,371)	0	(17,371)	(17,371)	(17,371)	0
(1,009)	(992)	(973)	Central School Services Block	(961)	0	(961)	(961)	(961)	0
(22,601)	(24,983)	(26,892)	High Needs Block	(27,942)	0	(27,942)	(27,942)	(27,942)	0
(103,737)	(109,014)	(115,985)	Total DSG Income	(125,793)	0	(125,793)	(125,793)	(125,793)	0
	(53)		In-year adjustments						
(103,737)	(109,067)	(115,985)	Total Income	(125,793)	0	(125,793)	(125,793)	(125,793)	0
			In year net deficit/(surplus):						
219	153	65	Schools Block	0	0	0	0	0	0
65	138	210	Early Years Block	0	0	0	(42)	(42)	(42)
(8)	(25)	(38)	Central School Services Block	0	0	0	13	21	21
1,227	1,474	4,265	High Needs Block	0	0	0	6,984	8,000	8,000
	(50)	39	Grant adjustment (re PPG)						
1,503	1,689	4,541	Net In-year Deficit	0	0	0	6,955	7,979	7,979
1,461	2,964	4,761	Deficit Balance in reserves	9,450		9,450	9,450	9,450	9,450
	108	148	In year reserve movement	0		0	94	94	94
2,964	4,761	9,450	Cumulative Deficit	9,450	0	9,450	16,499	17,523	17,523

5.6 The Quarter Two forecast shows an in-year forecast deficit of £8m, against the in-year efficiency target. When added to the cumulative deficit of £9.45m, the forecast year end deficit on the DSG is £17.5m.

5.7 In the Schools Block, the de-delegation for Ethnic Minority & Traveller Achievement Service is currently reviewing their staffing establishment and offer to schools. There could be a £50k underspend in year which will be off-set against future years costs. Other de-delegated services are also seeing some underspends against future year costs.

5.8 The Early Years Block has some savings against the service manager post of £42k. With new funding streams from April and September 2024 it is difficult to forecast the position on this block as the take up hours are variable.

5.9 Central Schools Services Block is showing a £21k pressure, mainly due to charges for Capita being higher than estimated.

5.10 The High Needs Block is currently showing a £119k overspend at Quarter Two. There are pressures on top up funding for Independent Special Schools of £760k which are being off-set by savings in Maintained Special Schools, Further Education and Out of Area Special Schools top ups.

- 5.11 Ongoing pressures are being driven by an increase in the number of children identified requiring an assessment of EHCP.
- 5.12 The table below shows the forecast position for the end of 2024/25 by block. The surplus balance on the Schools Block of £996k is supporting the forecast overspend position on the other blocks.

Reserve Balances (surplus)/deficit	1.4.2024 Actual	Change in reserves	In-year Deficit/ (Surplus)	31.3.2025 Forecast
Schools Block - growth fund	(817)	0	0	(817)
Schools Block De-delegated	(176)	94	0	(82)
Schools Block - other	(97)	0	0	(97)
Early Years Block	1,261	0	(42)	1,219
Central School Services Block	1	0	21	22
High Needs Block	9,336	0	8,000	17,335
Grant changes	(58)	0	0	(58)
Total Deficit Balance	9,450	94	7,979	17,522

6. Conclusion

- 6.1 The total forecast deficit on the DSG amounts to £17.5m, comprising £9.45m from previous years and a further £8m forecast overspend in year. The forecast position will be kept under review and updates provided to Schools' Forum.
- 6.2 The figures do not include any clawback from schools as this is a separate discussion at Schools Forum.

7. Heads' Funding Group Recommendation

- 9.1 n/a

8. Appendices

Appendix A – DSG 2024-25 Budget Monitoring Report Month 6

Dedicated Schools Grant Monitoring Report 2024/25 – Quarter Two

Dedicated School's Grant (DSG) 2024/2025 Budget Monitoring Month Six

Cost Centre	Description	Original Budget 2024/25	Net Virements in year	Amended Budget 2024/25	Forecast	Variance	Comments
90020	Primary Schools (excluding nursery funding)	57,339,140		57,339,140	57,339,140	0	
DSG top slice	Academy Schools Primary	0		0	0	0	
90025	Secondary Schools (excluding 6th form funding)	21,226,730		21,226,730	21,226,730	0	
DSG top slice	Academy Schools Secondary	0		0	0	0	
90230	DD - Schools in Financial Difficulty (primary schools)	0		0	0	0	
90113	DD - Trade Union Costs	61,690		61,690	61,690	0	
90255	DD - Support to Ethnic minority & bilingual Learners	195,100		195,100	195,100	0	Forecast is £40,000 underspend at Q2
90349	DD - Behaviour Support Services	243,430		243,430	243,430	0	Forecast is £18,000 underspend at Q2
90424	DD - CLEAPSS	3,480		3,480	3,480	0	
90470	DD - School Improvement	318,730		318,730	318,730	0	Forecast is £12,000 underspend at Q2
90423	DD - Statutory & Regulatory Duties	128,030		128,030	128,030	0	Forecast is £3,900 underspend at Q2
90235	School Contingency - Growth Fund/Falling Rolls Fund	0		0	0	0	Forecast is £77,220 at Q2 funded by reserves
90054	De-delegated funding from reserves	-94,020		-94,020	-94,020	0	
	SSR	95,420		95,420	95,420	0	
	Schools Block Total	79,517,730	0	79,517,730	79,517,730	0	
90583	National Copyright Licences	179,860		179,860	175,330	-4,530	
90019	Servicing of Schools Forum	46,250		46,250	46,250	0	
90743	School Admissions	186,210		186,210	197,910	11,700	
90354	ESG - Education Welfare	179,900		179,900	181,750	1,850	
90460	ESG - Statutory & Regulatory Duties	271,250		271,250	288,500	17,250	Cost of Capita higher than estimated
90054	Surplus budget to off-set cumulative deficit	5,420		5,420	0	-5,420	
	SSR	92,425		92,425	92,425	0	
	Central School Services Block DSG	961,315	0	961,315	982,165	20,850	
90010	Early Years Funding - Nursery Schools	1,140,380		1,140,380	1,140,380	0	
90037	Early Years Funding - Maintained Schools	2,278,300		2,278,300	2,278,300	0	
90036	Early Years Funding - PVI Sector	7,218,660		7,218,660	7,218,660	0	
90052	Early Years PPG & Deprivation Funding	219,580		219,580	219,580	0	
90053	Disability Access Fund	90,090		90,090	90,090	0	
90018	2 year old funding	3,646,040		3,646,040	3,646,040	0	
90023	Under 2's	1,886,860		1,886,860	1,886,860	0	
90017	Central Expenditure on Children under 5	414,060		414,060	371,900	-42,160	
90287	Pre School Teacher Counselling	68,610		68,610	68,610	0	
90238	Early Years Inclusion Fund	108,000		108,000	108,000	0	
90054	Early Years adjustment re grant funding	218,295		218,295	218,295	0	
	SSR	82,458		82,458	82,458	0	
	Early Years Block Total	17,371,333	0	17,371,333	17,329,173	-42,160	

Dedicated Schools Grant Monitoring Report 2024/25 – Quarter Two

Dedicated School's Grant (DSG) 2024/2025 Budget Monitoring Month Six

Cost Centre	Description	Original Budget 2024/25	Net Virements in year	Amended Budget 2024/25	Forecast	Variance	Comments
90026	Academy Schools RU Top Ups	1,259,560		1,259,560	1,218,850	-40,710	
90539	Special Schools - Top Up Funding	6,218,340		6,218,340	5,965,800	-252,540	
90548	Non WBC Special Schools - Top Up Funding	215,290		215,290	352,730	137,440	
90554	Non WBC free schools	618,120		618,120	643,960	25,840	
90556	SEMH provision at Theale	1,450,880		1,450,880	1,450,880	0	
90557	Kennet Valley Resource Unit	0	419,810	419,810	419,810	0	
90575	Non LEA Special School (OofA)	1,423,550		1,423,550	1,276,440	-147,110	
90579	Independent Special School Place & Top Up	7,389,410		7,389,410	8,151,970	762,560	
90580	Further Education Colleges Top Up	1,465,000		1,465,000	1,276,790	-188,210	
90617	Resourced Units top up Funding maintained	1,095,930	-419,810	676,120	676,120	0	
90618	Non WBC Resourced Units - Top Up Funding	105,640		105,640	60,430	-45,210	
90621	Mainstream - Top Up Funding maintained	1,821,000		1,821,000	1,836,190	15,190	
90622	Mainstream - Top Up Funding Academies	1,142,500		1,142,500	1,142,500	0	
90624	Non WBC Mainstream - Top Up Funding	140,380		140,380	137,800	-2,580	
90625	Pupil Referral Units - Top Up Funding	1,139,400		1,139,400	1,139,400	0	
90627	Disproportionate No: of HN Pupils NEW	150,000		150,000	190,000	40,000	
90628	EHCP PRU Placement	1,045,800		1,045,800	1,045,800	0	
	High Needs Block: Top Up Funding Total	26,680,800	0	26,680,800	26,985,470	304,670	
90320	Pupil Referral Units	660,000		660,000	660,000	0	
90540	Special Schools	2,860,000		2,860,000	2,860,000	0	
90546	Special Schools - Place Funding Post 16	790,000		790,000	790,000	0	
90551	Mainstream Maintained - post 16 SEN places	36,000		36,000	36,000	0	
90552	Special Schools and PRU Teachers Pay and Pension	332,520		332,520	332,520	0	
90584	Resourced Units - Place Funding	242,000		242,000	234,000	-8,000	
	High Needs Block: Place Funding Total	4,920,520	0	4,920,520	4,912,520	-8,000	
90240	Applied Behaviour Analysis	270,420		270,420	380,660	110,240	
90280	Special Needs Support Team	363,830		363,830	342,500	-21,330	
90281	SEND Strategy (DSG)	69,230		69,230	69,230	0	
90282	Medical Home Tuition	381,690		381,690	329,800	-51,890	
90237	High Needs Contingency	240,500		240,500	240,500	0	
90286	Early Years Speech & Language	0		0	0	0	
90287	Pre School Teacher Counselling	97,140		97,140	73,390	-23,750	
90288	Elective Home Education Monitoring	49,480		49,480	41,800	-7,680	

Dedicated Schools Grant Monitoring Report 2024/25 – Quarter Two

Dedicated School's Grant (DSG) 2024/2025 Budget Monitoring Month Six

Cost Centre	Description	Original Budget 2024/25	Net Virements in year	Amended Budget 2024/25	Forecast	Variance	Comments
90290	Sensory Impairment	296,460		296,460	253,380	-43,080	
90295	Therapy Services	526,080		526,080	534,910	8,830	
90372	Therapeutic Thinking	69,330		69,330	58,130	-11,200	
90373	Emotional Based School Avoiders (EBSA)	139,240		139,240	139,240	0	
90374	SEMH Practitioner	43,560		43,560	43,560	0	
90555	LAL funding	171,840		171,840	171,840	0	
90565	Equipment For SEN Pupils	15,000		15,000	15,000	0	
90577	SEN Commissioned Provision	650,830		650,830	680,040	29,210	
90582	PRU Outreach	61,200		61,200	61,200	0	
90585	HN Outreach Special Schools	50,000		50,000	50,000	0	
90610	Hospital Tuition	36,180		36,180	18,090	-18,090	
90830	ASD Teachers	301,490		301,490	301,490	0	
90961	Vulnerable Children	179,400		179,400	119,400	-60,000	
90581	Dingleys Promise	35,000		35,000	120,000	85,000	
	High Needs Block: Non Top Up or Place Funding	4,047,900	0	4,047,900	4,044,160	-3,740	
90054	Efficiency Target	-7,880,605		-7,880,605	0	7,880,605	
	SSR	173,697		173,697		-173,697	
	High Needs Block Total	27,942,312	0	27,942,312	35,942,150	7,999,838	
	TOTAL DSG EXPENDITURE	125,792,690	0	125,792,690	133,771,218	7,978,528	
90030	DSG Grant Account	-125,792,690		-125,792,690	-125,792,690	0	
	Net In-year Deficit	0	0	0	7,978,528	7,978,528	
	Deficit Balance brought forward	9,450,120		9,450,120	9,450,125	5	
	In year reserve movement				94,020	94,020	Funding from reserves for de-delegations
	Cumulative Deficit	9,450,120	0	9,450,120	17,522,673	8,072,553	

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Agenda Item 13

Schools Forum Work Programme 2024/25

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 2	Provisional DSG Funding Settlement Overview 2024/25	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Discussion	Melanie Ellis
	Final De-delegations 2025/26	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Decision	Lisa Potts
	Update on HNB Invest to Save Projects	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Discussion	tbc/Nicola Ponton
	School Funding Formula 2025/26	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Decision	Melanie Ellis
	Budgets for Additional Funds 2025/26	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Decision	Melanie Ellis
	Draft Central Schools Block Budget 2025/26	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Discussion	Melanie Ellis
	Draft High Needs Budget Proposals 2025/26	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Discussion	tbc
	Longitudinal data tracking exercise report	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Discussion	tbc
Term 3	Update on the the DfE's Delivering Better Value Programme (<i>standing item</i>)	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Discussion / Decision	Hester Collicut / Susan Tanner
	Deficit Schools (<i>standing item</i>) to included learning on why schools in deficit.	12/11/2024	19/11/2024	26/11/2024	02/12/2024	Information	Melanie Ellis
	Final DSG Funding Settlement Overview 2025/26	19/12/2024	08/01/2025	14/01/2025	20/01/2025	Discussion	Melanie Ellis
	Final School Funding 2025/26	19/12/2024	08/01/2025	14/01/2025	20/01/2025	Decision	Melanie Ellis
	High Needs Block Budget Proposals 2025/26	19/12/2024	08/01/2025	14/01/2025	20/01/2025	Decision	tbc
	Final Central School Block Budget Proposals 2025/26	19/12/2024	08/01/2025	14/01/2025	20/01/2025	Decision	Lisa Potts
	Growth Fund 2023/24	19/12/2024	08/01/2025	14/01/2025	20/01/2025	Information	Melanie Ellis
	DSG Monitoring 2024/25 Month 9			14/01/2025	20/01/2025	Information	Lisa Potts/Neil Goddard
Term 4	Update on the the DfE's Delivering Better Value Programme (<i>standing item</i>)	19/12/2024	08/01/2025	14/01/2025	20/01/2025	Discussion / Decision	Hester Collicut / Susan Tanner
	Deficit Schools (<i>standing item</i>)	19/12/2024	08/01/2025	14/01/2025	20/01/2025	Information	Melanie Ellis
	Work Programme 2025/26			04/03/2025	10/03/2025	Decision	Jessica Bailiss
	Final High Needs Block Budget 2025/26	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Decision	tbc
	Final Early Years Block Budget 2025/26	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Decision	Lisa Potts
	DSG Monitoring 2024/25 Month 10			04/03/2025	10/03/2025	Information	Lisa Potts/Neil Goddard
	Update on the the DfE's Delivering Better Value Programme (<i>standing item</i>)	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Discussion / Decision	Hester Collicut / Susan Tanner
	Deficit Schools (<i>standing item</i>)	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Information	Melanie Ellis

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Schools' Forum - Contracts - Forward Plan

The Schools' Forum must be consulted when the local authority is proposing a contract for supplies and services which is to be funded from the Schools Budget (Dedicated Schools Grant (DSG)) and is in excess of the EU procurement thresholds (£170,781.60).

Contract Title	Contract Start Date	Contract End Date (initial term)	Contract End Date (Including any Extension)	Contract Term in years (in brackets maximum possible extension)	Contract Total Value (£) based on Initial Term	Contract Amount (Total Value inclusive of Contract Extension Agreed)	Supplier name	WBC Responsible Officer	Notes
Special Educational Needs and Disabilities (SEND) Information, Advice and Support Service (SENDIASS)	01/08/2021	31/07/2024	31/07/2025	3 (4)	£164,850	£239,500	Rose Road Association	Thomas Ng / Kiki Hurford (supports procurement process only)	This contract is not funded from the DSG and is an Information item only. Spring 2024: one year extension was negotiated between council and provider and approved at Procurement Board
West Berkshire Schools Meals Service	24/07/2020	23/07/2023	23/07/2025	3 (2)	£600000approx	£1,000,000	Caterlink	Kiki Hurford (supports procurement process only)	Invoices are paid directly from schools that opted to be in the contract. The contract has been extended by two years to 2025 in consultation with the relevant WBC officers and the schools that are part of the contract. The contract is reviewed on an annual basis by the head teachers (in July). The procurement process is supported by a WBC Officer.
Education Packages for Young People with Severe Social Emotional and Mental Health Difficulties	01/09/2020	31/08/2023	31/08/2025	3 (2)	£1,674,000	£2,790,000	Engaging Potential LTD	Nicola Ponton / Catherine Kane Kiki Hurford (supports procurement process only)	Information on this contract was included within the High Needs Block Report brought to the Forum in March 2023.
Energy Framework - CCS framework RM6011 - Electricity	01/04/2017 (rolling contract since 2008)	01/10/2023	31/03/2025		£5,421,522		EDF (HH)	Adrian Slaughter/Sarah Wood	The central energy contract is a non-mandated contract that maintained schools can access for provision of their gas and electricity. Any schools interested in joining the contract should email energymangement@westberks.gov.uk for more information.
Energy Framework – CCS Framework RM6011 - Gas	01/04/2017 (rolling contract since 2008))	01/10/2023	31/03/2025		£1,325,589		Total	Adrian Slaughter/Sarah Wood	
Children and Young People's Integrated Therapies (CYPIT)	01/04/2023	31/08/2028	31/03/3031	5 (3)	£2,348,480	£3,757,568	Berkshire Healthcare Foundation Trust	Kiki Hurford / Thomas Bailey	A report was brought to the Schools' Forum meeting in October 2022 and the new therapy contract was agreed.

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