

Notice of Meeting

Schools Forum

Monday 10 March 2025 at 5.00pm

At Shaw House Church Road Newbury

Date of despatch of Agenda: Wednesday 5 March 2025

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 10 March 2025 (continued)

Forum Members: Reverend Mark Bennet, Nicolle Browning, Heather Codling, Iain Cottingham, Paul Davey, Jacquie 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

Agenda

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Agenda - Schools Forum to be held on Monday 10 March 2025 (continued)

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Monday 16th June 2025 at 5pm

Sarah Clarke
Interim Executive Director - Resources

If you require this information in a different format or translation, please contact
Jessica Bailiss on telephone (01635) 503124.



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SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON MONDAY 20 JANUARY 2025

Present: Jay Armstrong (Maintained Primary School Governor), 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), David Fitter (Academy School Headteacher), Richard Hand (Trade Union), Michelle Harrison (Maintained Primary Schools), Keith Harvey (Maintained Primary School Headteacher), Jon Hewitt (Maintained Special School Headteacher), Trevor Keable (Academy School Governor), Jo MacArthur (Maintained Primary Headteacher), Jamie Morton (Non School - Post 16 Providers), Chris Prosser (Maintained Secondary School Headteacher), Lesley Roberts (Maintained Primary School Headteacher), Graham Spellman ((Chair) Roman Catholic Diocese), Phil Spray (Maintained Primary School Governor), Chloe Summerville (Maintained Nursery School Headteacher) and Edwin Towill (Academy School Headteacher)

Also Present: Neil Goddard (Service Director - Education and SEND), Nicola Ponton (SEN Manager), Lisa Potts (Finance Manager), Jessica Bailiss (Democratic Services Officer) and Beth Kelly (Head of Early Years)

Apologies for inability to attend the meeting: Rose Carberry (Principal Adviser for School Improvement), AnnMarie Dodds (Executive Director - Children's Services), Jo Lagares (Maintained Primary School Headteacher), Julie Lewry (Academy School Headteacher), David Ramsden (Maintained Secondary School Headteacher) and Charlotte Wilson (Academy School Headteacher)

The Chair began the meeting by reflecting on the very sad news that Melanie Ellis, the West Berkshire Council lead for Finance, had passed away. He expressed that he felt it would be appropriate for the group to take a minute in silence to reflect upon their thoughts and prayers for Melanie and her family. He thanked everyone for their participation.

PART I

1 Minutes of previous meeting dated 2nd December 2024

The Minutes of the meeting held on 2nd December 2024 were approved.

2 Actions arising from previous meetings

The Chair addressed the actions from the previous meeting, noting that there was only one action item. A report addressing this was included under Agenda Item 13.

3 Declarations of Interest

No declarations of interest were received.

4 Membership

Jess Bailiss reported that there was only one membership update regarding Michelle Harrison's term of office, which was due to end in February 2025. Following consultation

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with the School Business Manager group, Michelle Harrison had confirmed her willingness to continue for a further term.

5 **Additional Funds Budget Requirement 2025/26 (Lisa Potts)**

Lisa Potts introduced the report (Agenda Item 6), which set out the proposed 2025/26 budgets for the Growth Fund and Additional High Needs fund. Lisa Potts explained that the report set out the proposed budgets for the growth fund and additional high needs fund for 2025-2026. Lisa Potts drew attention to the Growth Fund Criteria included within Appendix A to the report.

Lisa Potts highlighted that the recommendation was to distribute growth funding across all schools via the school formula. She noted that the value of the growth fund for 2025-2026 was £307,452.

Lisa Potts drew attention to the recommendation to set the high needs budget at £200k. This was for schools that had a disproportionate number of children with Special Educational Needs (SEN) needs. Lisa Potts invited questions on the report, noting that it was a regular report brought to the Forum on an annual basis.

Trevor Keable raised a question regarding whether the funding was just for West Berkshire children or if it included children from other authorities, such as Reading. Lisa Potts responded that the funding aimed to include children from other authorities, but there were challenges in updating the data for children not in their authority. She mentioned that if schools felt they had more children than what the average calculation included, they could review it on a case-by-case basis. Lesley Roberts added that schools could challenge the numbers and potentially have the funding backdated if it did not pick up children from across borders.

The Chair invited the Forum to consider the recommendations set out in section 2.1 and 2.2 of the report. It was proposed and seconded that recommendation 2.1, to agree that the DfE funding allocation for growth be distributed to all schools via the school formula, be approved. At the vote with all school representatives the motion was carried.

It was proposed and seconded that recommendation 2.2, to set the additional high needs fund at £200k, be approved. At the vote with all Forum members the motion was carried.

RESOLVED that recommendations 2.1 and 2.2 were approved as set out above.

6 **Final Central School Block Budget Proposals 2025/26 (Lisa Potts)**

Lisa Potts introduced the report (Agenda Item 7), which set out the budget proposal for services funded from the Central Schools' Services Block (CSSB) of the Dedicated Schools' Grant (DSG).

Lisa Potts explained that the CSSB covered a number of services, which were listed in the table in section 5.1 of the report. She highlighted a couple of areas that had seen increasing costs, including the school admissions team, which had additional work due to the influx of refugees and changes in school places, and the education welfare team, which was supporting more children. Lisa Potts reported that there had been a significant increase in the cost of the Capita system, which had moved to the cloud, resulting in a deficit in the current year. The Heads' Funding Group (HFG) had requested a value for money review on the CSSB, which would be included in the CSSB report for 2026-2027. Lisa Potts invited questions on the report and no questions were raised.

The Chair invited the Forum to consider the recommendations set out in section two of the report and suggested that recommendation 2.1 and 2.2 be voted on together. It was proposed and seconded that the recommendation to agree the CSSB for 2025/26 be

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agreed, and a review be undertaken on the value for money of the services of the CSSB, in line with the recommendation from the HFG. At the vote with all Forum members the recommendations were approved.

RESOLVED that recommendations 2.1 and 2.2 were approved as set out above.

7 **Final DSG Funding Settlement Overview 2025/26 (Lisa Potts)**

Lisa Potts introduced the report (Agenda Item 8), which set out the final Dedicated Schools' Grant (DSG) allocation for 2025/26.

Lisa Potts explained that the DSG allocations were based on the national funding formula used by the Department for Education (DfE) and were calculated using the October 2024 pupil numbers. She highlighted that the table in section 4.1 of the report showed the allocations for the different blocks, including the early years block, which had seen a significant increase due to the funding of additional hours for children aged nine months and above. Lisa Potts also drew attention to the increase in the Central Schools Services Block (CSSB) which had helped cover some of the areas discussed earlier in the meeting. No questions were raised in relation to the report.

RESOLVED that the Schools' Forum noted the report.

8 **Final School Funding 2025/26 (Lisa Potts)**

Lisa Potts introduced the report (Agenda Item 9), which set out the final school funding formula allocations for 2025/26. She mentioned that the tables in the appendices provided detailed information on the final formula rates and the allocations for individual schools. These figures were based on the consultation with schools and the items listed in section 3.3 of the report.

RESOLVED that the Schools' Forum noted the report.

9 **Growth Fund Application 24/25 (Lisa Potts)**

Lisa Potts introduced the report (Agenda Item 10), which provided information on payments made to schools from the Growth Fund budget in 2024/25. Lisa Potts explained that growth funding was allocated by the Department for Education (DfE) and could either be distributed through the school formula, as previously agreed, or from a separate Growth Fund. She highlighted that the table in section 5.4 of the report showed the forecast of the Growth Fund at the end of the next financial year. Lisa Potts mentioned that for the current year, there had only been one application from Trinity School as set out in section five of the report.

RESOLVED that the Schools' Forum noted the report.

10 **High Needs Block Budget Proposals 2025/26 (Neil Goddard/Nicola Ponton)**

Nicola Ponton introduced the report (Agenda Item 11), which provided information on the proposed 2025-26 High Needs Block (HNB) budget.

Nicola Ponton explained that the report had been updated from the one presented in December, with most of the details remaining unchanged. It was highlighted that the numbers had been adjusted to reflect placements made during that time. Also, following feedback from the Heads Funding Group, they had been looking at increasing places at some of the specialist provision in the area. Nicola Ponton had met with Jon Hewitt, the Headteacher at the Castle at Theale, who had agreed to extend the provision and provide an additional six places. She highlighted that this extension had a cost impact, which was reflected in the report.

RESOLVED that the Schools' Forum noted the report.

11 Early Years Funding Rates to Providers (Lisa Potts/Beth Kelly)

Lisa Potts introduced the report (Agenda Item 12), which set out the proposed funding rates for early years providers.

Lisa Potts explained that the Department for Education (DfE) had requested the publication of the rates by 28th February 2025, necessitating an earlier discussion of the rates ahead of the full budget for 2025-2026. She highlighted the rates for various funding streams, including uplifts for three and four-year-olds, two-year-olds, and under two-year-olds, as shown in table 5.2 of the report. Lisa Potts reported that the quality rate and the early years pupil premium would remain unchanged, while the Disability Access Fund was set by the DfE.

Lisa Potts reported that the Early Years Funding Group had discussed the rates and felt they were fair. She explained that the local authority was required to pass through 96% of the grant received to providers, with the remaining 4% retained for costs such as systems and quality checks. Lisa Potts acknowledged that there was still a deficit on the early years block and that the proposed rates aimed to address this while meeting the DfE's requirements. She asked if there were any questions on the report.

Keith Harvey raised a question about why the quality rate had not increased, given the teacher pay rise and other cost pressures. Lisa Potts responded that the decision was influenced by the existing deficit on the early years block and that a review of the criteria for the quality rate was planned. It was possible the quality rate might change in future years following this review.

Chris Prosser asked if the rates were lower than the local authority rates due to the aim of reducing the deficit. Lisa Potts confirmed that the rates were set to match the 96% pass-through requirement stipulated by the DfE, and the remaining 4% was retained to cover costs such as systems and quality checks. Lisa Potts reported that the impact on the deficit would be reviewed in the next meeting when discussing the 2025-2026 budget.

RESOLVED that the Schools' Forum noted the report and that the rates would be published as required.

12 Report setting out response to Trevor Keable's questions on LA Legal Responsibilities (Melissa Perry/Neil Goddard)

Neil Goddard introduced the report (Agenda Item 13), which set out a response to questions raised by Trevor Keable at the previous meeting in December.

Neil Goddard began by summarising the detailed written response provided in the report which provided an oversight of the work taking place in the areas requested by Trevor Keable. Neil Goddard acknowledged concerns regarding ensuring all children had access to suitable education and that there were sufficient places and services to support children to access provision.

Neil Goddard reported that he had received some further questions and comments from Trevor Keable and he moved on to address these.

Regarding 4.13 (2) of the report, where an Appendix 2 was referred to but not provided, Neil Goddard confirmed that this was because the piece of work related to Delivering Better Value (DBV) would be circulated after the meeting.

Regarding actions being taken and all of these being pre-exclusion, Neil Goddard confirmed that the preference was to avoid exclusions in the first instance and much work was required to support schools to meet the needs of pupils within school and work with

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the Local Authority (LA) as proactively as possible regarding the joint responsibility to ensure exclusions were minimised. Regarding expanding alternative provision, Neil Goddard reported that he had discussed this matter with a number of headteachers since joining the LA and this was also within the context of developing the commissioning function, which had been identified as part of DBV. The development of alternative provision and offering a broader breadth of this service was something the commissioning function would be doing. Neil Goddard referred to iCollege, which was an outstanding provision that provided a wide range of services, and acknowledged the need for there to be clarity about funding and services that could be provided and expanded.

Regarding the Fair Access Protocol, Neil Goodard reported that there was a Pupil Placement Panel (PPP) and fair access arrangements for children deemed difficult to place. The fair access protocol and PPP arrangements were currently under review by Education and Children's Services, in consultation with schools, to ensure they were fit for purpose. This work was underway and ongoing.

Trevor Keable queried if schools could have students imposed upon them through the fair access protocol and if a school had the right to say no. Neil Goddard explained that the intention of the fair access protocol and pupil placement process was to bring schools together and mutually agree a way forward. Locally this process had worked well over a period of time however, he acknowledged that sometimes challenges were faced that might complicate conversations, particularly if there was not a feeling of equity across schools. The current proposal had not been formed because the current arrangements were failing but it was about ensuring the process was fit for purpose moving forward and all involved were clear about how it worked. Neil Goddard explained that fair access provided the LA with the opportunity to direct a school to take a pupil if necessary however, Neil Goddard emphasised that this was not something the LA was keen to do and the focus was on mutual agreement and collaboration.

Chris Prosser commented that his understanding was that the fair access protocol was being reviewed because it was not working effectively. He noted that there were concerns about the process and the need for clearer procedures. Neil Goddard acknowledged the points raised and agreed that there were areas for improvement. He commented on the secondary headteacher group and that this was a particularly positive arrangement that not all LA areas benefitted from. The review was not a response to the process being inoperative however, concerns had been raised and these were likely to become more regular due to the pressure faced by schools and the High Needs Block.

Chris Prosser commented that the purpose of iCollege had changed over time, and they needed to think carefully about the provision and what it should be used for moving forward. Chris Prosser felt that capacity at iCollege needed to be increased. Neil Goddard agreed and commented that it was important to ensure iCollege had the opportunity to continue successfully and this could only be delivered through ensuring there was clarity about its purpose and function. It had been very beneficial to the system that iCollege had provided flexibility in terms of adapting and growing its offer but to provide security, its role and how it was funded needed to be defined.

Trevor Keable asked for clarification on the term "enhanced service offerings" for pupil referral units mentioned on page 72 of the report. Neil Goddard explained that this was similar to the point he had made about alternative provision in that they were very fortunate to have iCollege in place however, the needs of children were so diverse they needed to be able to respond to all of these in an appropriate way. The offer available needed to be made as broad as possible and reflect the current need of children in the system. The commissioning resource received would support work with providers to help

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them understand what was required in West Berkshire so that they could look to how this could be delivered.

The Chair thanked Neil Goddard for his detailed response. Trevor Keable expressed his appreciation for the thorough answers and the time taken to address his questions.

RESOLVED that:

- Appendix 2 referred to in the report would be circulated following the meeting.

13 Forward Plans

The Schools Forum noted the forward plans.

14 Date of the next meeting

The next meeting would take place on Monday 10th of March 2025 at 5pm, in person at Shaw House.

(The meeting commenced at 5.00 pm and closed at 5.45 pm)

CHAIR

Date of Signature

Actions from previous meetings

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Update
Jan25-Ac1	20th January 2025	Report setting out response to Trevor Keable's questions on LA Legal Responsibilities	Appendix 2 referred to in the report would be circulated following the meeting.	Neil Goddard	Completed. Information circualted.

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Agenda Item 6

Schools Forum Work Programme 2025/26

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 5	Election of Chair and Vice-Chair 2025/26	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Decision	
	School Balances 2024/25	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Discussion	Lisa Potts
	Scheme for Financing Schools Consultation 2025/26	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Decision	Lisa Potts
	DSG Outturn 2024/25	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Information	Lisa Potts
	Vulnerable Children's Fund - Annual Report for 2024/25			10/06/2025	16/06/2025	Information	Nicola Ponton/Beth Cartwright
	Trade Union Facilities Time - Annual Report for 2024/25			10/06/2025	16/06/2025	Information	Richard Hand
	Update on the the DfE's Delivering Better Value Programme (<i>standing item</i>)	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Discussion / Decision	Neil Goddard
Deficit Schools (<i>standing item</i>)			10/06/2025	16/06/2025	Information	Lisa Potts	
Term 6	Schools' Forum Membership and Constitution from September 2025			08/07/2025	14/07/2025	Decision	Jessica Bailiss
	Scheme for Financing Schools 2025/26	24/06/2025	01/07/2025	08/07/2025	14/07/2025	Decision	Lisa Potts
	Surplus Balances and School Balance Statements	24/06/2025	01/07/2025	08/07/2025	14/07/2025	Decision	Lisa Potts
	DSG Monitoring 2025/26 Month 3			08/07/2025	14/07/2025	Information	Lisa Potts/Neil Goddard
	Update on the the DfE's Delivering Better Value Programme (<i>standing item</i>)	24/06/2025	01/07/2025	08/07/2025	14/07/2025	Discussion / Decision	Neil Goddard
Deficit Schools (<i>standing item</i>)	24/06/2025	01/07/2025	08/07/2025	14/07/2025	Information	Lisa Potts	
Term 1	Schools Funding Formula Consultation 2026/27	24/09/2025	01/10/2025	07/10/2025	13/10/2025	Decision	Lisa Potts
	Draft De-delegations 2026/27	24/09/2025	01/10/2025	07/10/2025	13/10/2025	Decision	Lisa Potts
	DSG Monitoring 2025/26 Month 6	24/09/2025		07/10/2025	13/10/2025	Information	Lisa Potts/Neil Goddard
	Update on the the DfE's Delivering Better Value Programme (<i>standing item</i>)	24/09/2025	01/10/2025	07/10/2025	13/10/2025	Discussion / Decision	Hester Collicut
Deficit Schools (<i>standing item</i>)	24/09/2025	01/10/2025	07/10/2025	13/10/2025	Decision	Lisa Potts	
Term 2	Provisional DSG Funding Settlement Overview 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion	Lisa Potts
	Final De-delegations 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	Lisa Potts
	Update on HNB Invest to Save Projects	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion	Nicola Ponton
	School Funding Formula 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	Lisa Potts
	Budgets for Additional Funds 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	Lisa Potts
	Draft Central Schools Block Budget 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion	Lisa Potts
	Draft High Needs Budget Proposals 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion	Neil Goddard/Nicola Ponton
	Update on the DfE's Delivering Better Value Programme (<i>standing item</i>)	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion / Decision	Neil Goddard
Deficit Schools (<i>standing item</i>) to included learning on why schools in deficit.	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Information	Lisa Potts	
Term 3	Final DSG Funding Settlement Overview 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion	Lisa Potts
	Final School Funding 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Decision	Lisa Potts
	Growth Fund Applications 2025/26	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion	Lisa Potts
	Additional Funds Budget Requirement 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion	Lisa Potts
	High Needs Block Budget Proposals 2025/26	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion	Neil Goddard/Nicola Ponton
	Final Central School Block Budget Proposals 2025/26	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Decision	Lisa Potts
	Early Years Rates	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion	Lisa Potts/Beth Kelly
	DSG Monitoring 2025/26 Month 9	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Information	Lisa Potts/Neil Goddard
	Update on the DfE's Delivering Better Value Programme (<i>standing item</i>)	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion	Neil Goddard
	Deficit Schools (<i>standing item</i>)	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Information	Lisa Potts
Term 4	Work Programme 2026/27	24/02/2026	03/03/2026	16/03/2026	16/03/2026	Decision	Jessica Bailiss
	Final High Needs Block Budget 2026/27	24/02/2026	03/03/2026	16/03/2026	16/03/2026	Discussion	Neil Goddard/Nicola Ponton
	Final Early Years Block Budget 2026/27	24/02/2026	03/03/2026	16/03/2026	16/03/2026	Decision	Lisa Potts/Beth Kelly
	DSG Monitoring 2025/26 Month 10	24/02/2026		16/03/2026	16/03/2026	Information	Lisa Potts/Neil Goddard
	Update on the DfE's Delivering Better Value Programme (<i>standing item</i>)	24/02/2026	03/03/2026	16/03/2026	16/03/2026	Discussion	Neil Goddard
	Deficit Schools (<i>standing item</i>)	24/02/2026	03/03/2026	16/03/2026	16/03/2026	Information	Lisa Potts

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Early Years Budget 2025/26

Report being considered by: Schools' Forum on 10th March 2025

Report Author: Beth Kelly & Lisa Potts

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

1. Purpose of the Report

1.1 To set out the proposal for the Early Years budget 2025/26, which is based upon the recommendations of the Early Years Funding Group.

2. Recommendations

2.1 That the Early Years DSG budget for 2025/26 to be set at the level detailed in the budget model and agreed.

2.2 That there remains a focus on deficit recovery and lowering of the pass-through rate.

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:	Early Years Funding Group			

4. Forecast Outturn for 2024/25

- 4.1 The figures in the forecast table below are based on actual hours for the 2024/25 year, with a small contingency to allow for any final changes in the Spring 2025 hours.
- 4.2 There is a forecast overspend of £2.1m on the delegated funds, which is due larger than forecast number of hours for the 2 new entitlements (for working parents of 2 year olds and 9 months and over). This will be off-set by an increase in grant for the year.
- 4.3 The centrally managed funds have a forecast saving of £128k, which is mainly due to a lower uptake of the Disability Access Fund than we were funded for and a small underspend in the SEN Inclusion Fund.
- 4.4 The initial budget allocation was based on January 2023 census, based on the current census we are due to receive £770k additional funding from the DFE, but final figures won't be known until July 2025.

The table below shows the forecast outturn for 2024/25 :

	2024/25 Budget Set	2024/25 Forecast	2024/25 Variance
	£	£	£
Funds Delegated to Early Years Providers			
PVI Providers	7,218,655	7,204,569	-14,086
Nursery classes in Mainstream Schools	2,278,296	2,223,743	-54,553
Maintained Nursery Schools (including MNSS lump sum)	1,140,378	1,113,635	-26,743
2 Year Old Funding	900,687	864,919	-35,768
2 Year old working parents	2,745,356	3,733,601	988,245
Under 2's	1,886,859	3,005,715	1,118,856
Pupil Premium Grant (40%) and deprivation funding (60%)	219,584	341,804	122,220
Total Delegated Funds	16,389,815	18,487,986	2,098,171
Centrally Managed Funds			
Central Expenditure on Children Under 5 (90017)	414,060	382,660	-31,400
Early Development Intervention Team (EDIT) (90287)	68,610	68,610	0
SEN Inclusion Fund (90238)	108,000	71,500	-36,500
Disability Access Fund (90053)	90,090	30,000	-60,090
SSRs	82,458	82,458	0

Total Centrally Managed Funds	763,218	635,228	-127,990
TOTAL EXPENDITURE	17,153,033	19,123,214	1,970,181
Early Years DSG Block Funding In Year	-17,371,331	-18,710,501	-1,339,170
In year overspend (under spend)	-218,298	412,713	631,011
Early years funding adjustment		-770,351	-770,351
Early Years DSG Block Overspend from previous year	1,248,516	1,261,358	12,842
FORECAST CUMULATIVE DEFICIT AT YEAR END	1,030,218	903,719	-126,499

5. Deficit Recovery

- 5.1 The 2024/25 figures show a reduction on the overall deficit of the block. The savings on the centrally managed funds have helped bring the deficit down.
- 5.2 As we move into 25/26 it is hoped that the increase in grant levels and change to pass-through rate will bring the block to a more sustainable position.

6. The funding rate Framework for 2025/26

- 6.1 At the Spring Budget 2023, the government announced the 30 hours entitlement will be extended in stages from April 2024 to children aged nine months to three years by 2027/28. The new entitlements will be rolled out in stages –
- From April 2024, all working parents of 2 year olds can access 15 hours per week
 - From September 2024, all working parents of children ages 9 months up to 3 years can access 15 hours per week
 - From September 2025, all working parents of children aged 9 months to 3 years old can access 30 hours free childcare per week
- 6.2 Grant funding rates from central government to West Berkshire Council are shown in the table below:

	Local authority rates for 2025/26
3 & 4 year old funding rate (per hour)	£6.49
2 year old funding rate (per hour)	£9.06
Under 2 year olds funding rate (per hour)	£12.30
Disability Access Fund (DAF) (per child)	£938.00
Early Years Pupil Premium (per hour)	£1.00

- 6.3 Local Authorities are required to set an average funding rate for providers for each funding stream which is at least 96% of the authority's funding rate. This minimum funding level is referred to as the pass through rate.
- 6.4 An SEN Inclusion fund continues to support our young children with SEN.

7. Budget Model for 2025/26

7.1 We are now in the fourth year of the funding announced in the Spending Review in October 2021.

7.2 The DFE requested that provider rates were agreed by 28th February. The table below shows the rates for providers for 2025/26 as previously agreed at the January meeting of the Schools Forum.

	Provider funded rates for 2024/25	Provider funded rates for 2025/26	% uplift
3 & 4 year old funding rate (per hour)	£5.44	£5.83	7.17%
3 & 4 year old quality rate (per hour)	£0.60	£0.60	-
2 year old funding rate (per hour)	£8.30	£8.68	4.58%
Under 2 year olds funding rate (per hour)	£11.16	11.79	5.65%
Disability Access Fund (DAF) (per child)	£910.00	£938.00	3.08%
Early Years Pupil Premium (per hour)	£1.72	£1.72	-

7.3 The Local Authority is allowed to fund from the grant some centrally provided services, including staffing and IT costs in relation to overseeing the delivery of the free entitlement, sufficiency of places, eligibility checking, and administration of funding payments to providers. However funding for these services is limited by the requirement to set a “pass-through rate” for 3 and 4 year olds which is at least 96% of the authority’s funding rate.

7.4 All funding streams are subject to the pass-through rate of 96%.

7.5 It should be noted that 2019/20 the single base rate was increased to support all providers with the additional costs that have impacted on them over the past two years; rises in the minimum wage and pension costs alongside the introduction of the additional free entitlement to working parents. However this rise has impacted upon the pass-through rate taking it above 100% and has resulted in the overspend position that is being addressed.

7.6 It is expected that the grant income for 25/26 is approx. £27m. We have set the pass-through rates at 96% for all funding streams, leaving 4% to support centrally managed funds. The in-year surplus of £296k shown below is the result of using less than the 4% allowed on central support.

7.7 The 2025/26 budget is shown below using the rates shown above:

	2025/26 Yr 1 Budget
	£
Funds Delegated to Early Years Providers	
PVI Providers	7,783,440
Nursery classes in Mainstream Schools	2,375,748
Maintained Nursery Schools	1,239,656
2 Year Old Funding	904,517
2 Year old working parents	5,466,937

Under 2's	8,009,292
Pupil Premium Grant (58%) and deprivation funding (42%)	341,804
Total Delegated Funds	26,121,395
Centrally Managed Funds	
Central Expenditure on Children Under 5 (90017)	442,390
Early Development Intervention Team (EDIT) (90287)	77,560
SEN Inclusion Fund (90238)	108,000
Disability Access Fund (90053)	107,870
SSRs 85,642	85,642
Total Centrally Managed Funds	821,462
TOTAL EXPENDITURE	26,942,857
Early Years DSG Block Funding In Year	-27,240,311
In year surplus	-297,454
Early Years DSG Block Funding carried forward	903,719
OVERALL NET POSITION	606,265

8. Conclusion

- 8.1 The Early Years Block budget has been set at a level which has seen a realignment of the pass-through rate and reduce some of the deficit budget. While balancing the needs of the local childcare providers and the pressures of the current cost of living issues. Thus providing a viable pass-through rate.
- 8.2 The deficit will be monitored to ensure the overall position of the block is recovering the current shortfall.

9. Recommendation

- 9.1 That the Early Years DSG budget for 2025/26 be set at the level detailed in the budget model are agreed.
- 9.2 That there remains a focus on deficit recovery.

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High Needs Block (HNB) Budget 2025/26

Report being considered by: Schools' Forum
Date of Meeting: 10th March 2025
Report Author: Nicola Ponton & Neil Goddard
Item for: Discussion **By:** All Forum Members

1. Purpose of the Report

1.1 To provide information on the proposed 2025-26 HNB budget.

2. Recommendations

2.1 To note and provide feedback on the HNB budget for 2025-26.

2.2 To include the current, Invest to Save initiatives and non-statutory services in the HNB budget currently, with the caveat that their continuation will be reviewed as part of the Delivering Better Value (DBV) programme. These projects include:

- 1 FTE SEMH post
- £90,000 to maintain i-College placements

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 Setting a balanced budget for the High Needs Block remains a major challenge due to the rising number of high needs pupils and increasing unit costs, while place funding has remained static. The number of children with EHCPs continues to grow significantly, despite consistent thresholds being applied. The total number of EHCPs in January 2024 was 1534 compared to 971 in 2019, an increase of 58% in five years. The data below is taken from the SEN 2 returns which is published in January each year but reports on the year prior. For context, the current number of EHCPs in West Berkshire is 1656.

Year	WBC EHCP Total	% increase from 2019	National EHCP Total	% increase from 2019
2018	971	-	353,995	-
2019	1034	6.5%	390,109	10%

2020	1074	10.61%	430,697	22%
2021	1198	23.4%	473,255	34%
2022	1322	36%	517,049	46%
2023	1532	58%	575,963	63%

- 3.2 4.7% of children and young people in West Berkshire had an EHCP in 2023, up from 4.5% in 2022. This is higher than the national average (4.3%) and when compared to the Southeast (4.6%) and Statistical Neighbours (4.33%).
- 3.3 The demand for additional EHCPs has been intensified by the Covid pandemic which caused some children to fall further behind, leading to an increase in EHCP requests. Additionally, the pandemic has also exacerbated a pre-existing issue with rising incidence of Emotionally Based School Avoidance (EBSA).
- 3.4 Up until 2016-17, West Berkshire was setting a balanced high needs budget. Since then, the budget has been under pressure on an annual basis. A decision was made to set a deficit budget for the first time in 2016/17 and the budget has continued to be overspent each year since that time. The table below sets out the deficit HNB budgets set over the last 9 years:

Financial year	HNB Allocation	Block transfer	Total HNB Deficit Budget set	Difference between budget set and HNB allocation
16/17	-18,118,428	-858,000	21,584,180	2,607,752
17/18	-20,056,233	0	20,312,740	256,507
18/19	-19,958,537	27,000	20,041,180	109,643
19/20	-20,100,067	0	21,748,000	1,647,933
20/21	-21,691,304	-263,285	23,114,920	1,160,331
21/22	-23,631,318	-548,568	25,479,384	1,299,498
22/23	-26,282,076	-300,166	28,241,087	1,658,845
23/24	-28,495,697	0	31,587,958	3,092,261
24/25	-29,153,266	-335,047	37,408,701	7,920,388

- 3.5 Pressure on the High Needs Block is a national issue, with many local authorities having significant overspends and setting deficit budgets. The 35 Local Authorities with the highest level of overspend are now part of the Government's Safety Valve Programme. While another 55 Local Authorities participate in the Delivering Better Value (DBV) Programme. There are three tranches to this programme; West Berkshire is in the third tranche.
- 3.6 The Local Authority's statutory duties for children with SEND are effectively open ended in that if a child requires an EHC Plan it must be provided regardless of budgetary constraints. Criteria for initiating an Education, Health and Care assessment are robustly applied by the SEN Panel (which has Headteacher representation). However, despite robust management of demand, the number of children with EHCPs continues to rise. The total number of EHCPs in January 2024 is 1534 compared to 972 in 2019, a rise of 58% in five years. The current number of EHCPs is 1656. The increase in EHCPs is largely concentrated in specialist

placements rather than mainstream schools, which is the main factor driving budget pressure in the High Needs Block

- 3.7 The creation of more local provision for children with SEMH and autism has alleviated some pressures, as local maintained provision is more cost effective than independent and non-maintained provision. The Castle@Theale provision has twenty-four children on roll, rising to thirty-six by September 2025 and to its full capacity of forty-two by 2026. The LA has worked with The Castle@Theale School to create capacity for an additional class in September 2025. Every one of these children would have needed to be placed in a non-maintained or independent special school. The new Kennet Valley SEMH/Autism provision opened in September 2024 with six children, rising to twelve by 2025. It is expected that a further twelve place primary SEMH provision in the west of the Authority will be established as a matter of urgency based upon identified need. A sufficiency strategy has now been completed as part of the DBV programme and this will guide further investment in additional capacity.
- 3.8 It is critical that mainstream schools receive support to maintain more children with SEND in mainstream settings. This includes children with SEMH and autism. There has been some success in avoiding specialist placements through initiatives such as Therapeutic Thinking, the enhancement of the Autism Team and the creation of an EBSA Team. The refreshed SEND Strategy for 2024-29 is proposing further measures to increase capacity in mainstream schools, the DBV Programme will include initiatives to support inclusive practice in mainstream schools. (See Appendix B)
- 3.9 Tables 2, 3, 4 and 5 in Appendix A show where the predicted 2025-26 costs exceed 2024-25 budgets.
- 3.10 Based on currently available data, the current position on the HNB budget for 2024-25 and 2025-26 is set out in the table below. In summary, the total budget needed in 2025-26 is **£44,867,310**. The in year overspend is predicted to be **£14,042,024** and the total cumulative overspend will be **£31,101,906**.

Cost Centre	Description	Proposed Budget 2025/26
90539	Special Schools Maintained	6,601,730
90548	Non WBC special schools	257,870
90554	Non WBC free schools	504,750
90617	Resource Units Maintained	725,120
90026	Resource Units Academies	1,297,350
90618	Resource Units Non WBC	43,720
90621	Mainstream Maintained	2,039,520
90622	Mainstream Academies	1,199,630
90624	Mainstream Non WBC	124,980
90575	Non Maintained Special Schools	1,456,230
90579	Independent Special Schools	11,425,820
90580	Further Education	1,726,810

90627	Disproportionate HN Pupils	200,000
90556	New SEMH Provision at Theale	1,901,700
90557	Kennet Valley Resource Base	655,840
90625	PRU Top Up Funding	1,196,370
90628	PRU EHCP SEMH Placements	1,255,470
	High Needs Block: Top Up Funding Total	32,612,910
90540	Special Schools	3,410,000
90546	Special Schools - Place Funding Post 16	790,000
90584	Resourced Units - Place Funding	304,000
90552	Special Schools and PRU Teachers Pay and Pension	334,603
Top Slice	Resource Units Academies – pre 16	598,000
90551	Mainstream Maintained - post 16 SEN places	48,000
Top Slice	Mainstream Academies – post 16	60,000
Top Slice	Further Education	786,000
90320	Pupil Referral Units	860,000
	High Needs Block: Place Funding Total	7,190,603
90240	Applied Behaviour Analysis	0
90573	Education Other Than At School (EOTAS)	279,472
90574	Spot Purchase Alternative provision	376,092
90290	Sensory Impairment	251,220
90577	SEN Commissioned Provision	722,336
90565	Equipment for SEN Pupils	20,000
90295	Therapy Services	614,680
90288	Elective home Education Monitoring	72,360
90282	Medical Home Tuition	403,760
90610	Hospital Tuition	36,180
90281	SEND Strategy (DSG)	75,140
90237	Alternative Provision Co-ordinator	42,640
90555	Language and Literacy Centres LALs	183,920
90585	Specialist Inclusion Support Service	50,000
90582	PRU Outreach Service	61,200
90280	Cognitive and Learning Team	395,110
90830	ASD Advisory Service	326,130
90372	Therapeutic Thinking	76,700
90961	Vulnerable Children	179,400
90287	Early Development and Inclusion Team	151,355
90581	Dingley's Promise	125,000
90373	Emotionally Based School Avoidance (EBSA)(WBC Led)	144,520
90237	Emotionally Based School Avoidance (EBSA) (school led)	110,960
90237	Transition project - part funded DBV	46,310
90374	SEMH Practitioner	54,240

	Invest to save - i-college	90,000
	High Needs Block: Non Top Up or Place Funding	4,888,725
	SSR	175,072
	High Needs Block Total	44,867,310

The impact of the additional resources allocated in the recent budget have not been included, and any transfer between High Needs and School's Block will reduce the projected deficit.

The increase in the estimated budget requirement for 25-26 relates mainly to the following costs:

- Independent and non-maintained school placements – increased budget requirement of **£4,036,410**
- Special School top ups - increased budget requirement of **£383,390**
- Mainstream EHCP top ups – increased budget requirement of **£275,650**
- Increased cost of EOTAS provision of **£385,144**
- Castle@Theale planned increase in numbers in 2025/6 + additional class – increased budget requirement of **£450,820**
- Kennet Valley SEMH resource planned increase in numbers for 2025 – increased budget requirement of due to additional staffing costs **£236,030**
- Further Education – increase in budget requirement of **£261,810**
- PRU - increased budget requirement of **£266,640**

3.11 Details of the services paid for from the high needs budget and the corresponding budget information are set out in Appendix A, together with an explanation of the reasons for budget increases.

4. Proposals

4.1 To consider and comment on the HNB budget for 2025-26 including the breakdown by cost centre as set out in Appendix A.

4.2 To continue to monitor and scrutinise the HNB overspend through regular meetings of the Heads Funding Group.

5. Conclusion

6.1 The HNB continues to be under considerable pressure for the reasons set out in this report, due to increased demand for independent and non-maintained special school placements and increased EHCPs in mainstream schools. The DBV programme will reduce the rate at which HNB spend is increasing but will not bring it in line with the HNB budget. Further work is currently being undertaken to identify ways in which spend can be brought

in line with the budget by 2028. In the interim, the HFG / Schools Forum is asked to consider the deficit HNB budget as set out in this report.

6. Heads' Funding Group Recommendation

7.1 To be decided at Heads' Funding Group meeting.

7. Appendices

7.1 Appendix A - High Needs Budget Detail

7.2 Appendix B - Delivering Better Value (DBV) Programme Update

7.3 Appendix C - Historical Data

Appendix A

High Needs Budget Detail

1. PLACE FUNDING – STATUTORY

- 1.1 Place funding is determined by the Education and Skills Funding Agency (ESFA) and has to be passed on to the institution, forming their base budget. Academy and FE places are included in the initial HNB allocation but the agreed place numbers are then deducted and paid to the institution direct (DSG top slice).
- 1.2 The ESFA will not fund any overall increases to places. If additional places are needed in academies or FE colleges, a request can be made to the ESFA. However, any additional places agreed would be top sliced from West Berkshire’s HNB allocation; no additional funding is made available.
- 1.3 As it is not possible to request increased planned place funding for maintained schools, any increase in place funding needed which is over and above the number of places set out below would need to be allocated to the relevant top up budgets, creating additional pressure on those budgets. The actual numbers on roll at The Castle and Brookfields Schools (including children from other Local Authorities) are 199 and 221 respectively (rising to 224 in Jan 2025), a total of 420.

TABLE 1 - Place Funding Budget	2024/25 Budget			2025/26 Estimated Budget		
	No. of Places	£	Current No. of Pupils	Proposed No. of Places	£	Difference in number
Special Schools - pre 16	286	2,860,000	420	344	3,410,000	58
Special Schools – post 16	79	790,000		79	790,000	0
Resource Units Maintained – pre 16	35	234,000	33	47	304,000	12
Special Schools and PRU Teachers Pay and Pension		332,520		0	334,603	0
Resource Units Academies – pre 16 (DSG top slice)	97	610,000	93	97	598,000	0
Mainstream Maintained post 16	6	36,000	16	8	48,000	2
Mainstream Academies – post 16 (DSG top slice)	27	162,000	10	10	60,000	-17
Further Education	129	774,000	113	131	786,000	2
PRU Place Funding (90320)	66	660,000	90	86	860,000	20
TOTAL	725	6,458,520	769	802	7,190,603	77

2. TOP UP FUNDING – STATUTORY

2.1 Top up funding is paid to the institutions where we are placing pupils who live in West Berkshire (we do not pay our institutions top up funding for pupils who live outside West Berkshire). **Table 2** shows the budget and forecast for 2024/25 and the estimate for 2025/26.

TABLE 2 Top Up Budgets	2024/25 Budget			2025/26	Difference 24/25 budget & 25/26 prediction
	Budget £	Forecast £ (Month 10)	Over/ (under) £	Estimate £	
Special Schools Maintained (90539)	6,218,340	5,875,000	-343,340	6,601,730	+383,390
Non WBC special schools (90548)	215,295	332,720	117,425	257,870	+42,575
Non WBC free schools (90554)	618,120	643,960	25,840	504,750	-113,370
Resource Units Maintained (90617)	676,120	725,120	49,000	725,120	+49,000
Resource Units Academies (90026)	1,259,560	1,211,950	-47,610	1,297,350	+37,790
Resource Units Non WBC (90618)	105,640	60,430	-45,210	43,720	-61,920
Mainstream Maintained (90621)	1,821,000	2,006,980	185,980	2,039,520	+218,520
Mainstream Academies (90622)	1,142,500	1,157,000	14,500	1,199,630	+57,130
Mainstream Non WBC (90624)	140,385	153,340	12,955	124,980	-15,405
Non Maintained Special Schools (90575)	1,423,550	1,301,430	-122,120	1,456,230	+32,680
Independent Special Schools (90579)	7,389,410	8,294,710	905,300	11,425,820	+4,036,410
Further Education (90580)	1,465,000	1,726,810	261,810	1,726,810	+261,810
Disproportionate HN Pupils (90627)	150,000	224,740	74,740	200,000	+50,000
New SEMH Provision at Theale (90556)	1,450,880	1,463,310	12,430	1,901,700	+450,820
Kennet Valley Resource (90557)	419,810	433,500	13,690	655,840	+236,030
TOTAL	24,495,610	25,611,000	1,115,390	30,161,070	+5,665,460

2.2 Maintained Special Schools

There will be an increase in costs of £383,394 this is due to the expansion of provision at The Castle School which is due to open in Jan 2026.

2.3 Non West Berkshire Special Schools

There is an increase in costs due to an increase in pupils attending special schools in neighbouring local authorities.

2.4 Non West Berkshire Free Schools

The free special schools used by West Berkshire Council are primarily schools for children with autism. These schools tend to be used for children whose needs cannot be met by our own resourced ASD provision in mainstream schools. There is a significant saving in this budget as a number of young people are due to leave their Free school at the end of year 11 in July 2025.

2.5 Resource Budgets (Academies/Maintained and Non West Berkshire)

As part of the DBV programme a sufficiency plan is being created to increase the range of provision across West Berkshire, to ensure that current, and future, needs of children and young people with SEND are met locally, whilst allowing flexibility for adapting to changing demands. This will lead to increases in these budgets over time. For 25-26 there are small variations to the Academies/Maintained and Non West Berkshire resource units budgets this is due to moves for specific children.

2.6 Mainstream top ups (maintained and academies)

Due to pressures on the HNB, the value of EHCP funding bands for children in mainstream schools has not been increased for several years. This has resulted in a situation whereby the funding no longer delivers the level of support it should deliver and schools either have to supplement the funding from their own budgets or children receive less support than they should. This is increasingly being raised as a concern by Headteachers and parents This is being addressed via the SEND banding review outlined in appendix B. Due to the increasing number of pupils in mainstream school with an EHCP an increase in both budgets is recommended

2.7 Independent special schools and non-maintained special schools

The demand for independent and non-maintained school placements for children with autism and SEMH continues to rise. There is a national shortage of placements of this type which has meant that we have had several children waiting for placements for some time. Four independent schools for children with these needs have opened in the West Berkshire area: Mile House, The Grange, Haywards Farm including (Northcroft school) and Oaklands. This has meant that children who had already been waiting for a place, or who would previously have had to wait for a place, have all been offered placements, which is positive in terms of meeting those children's needs, but has had a significant impact on the budget. Another issue affecting this budget is the shortage of places at The Castle and Brookfields schools. Most children waiting for a place remain in their mainstream schools, but in some cases, it has been necessary to place children in non-maintained or independent special schools. An additional factor is the high level of fee increases on independent and non-maintained specialist placements.

The predictions of cost for specialist placements in 2025-26 take in to account existing pupils, additional known pupils whose needs can no longer be met in local schools, together with some cases which are due to go to the SEND Tribunal. It is not possible to predict all pupils who may need placements in 2025-26. To account for this unpredictability, we have built in a percentage increase into the cost of these placements based on EHC plan trends over the last 3 years.

Due to the number of placements made over 24/25 and the continued demand for highly specialist placements the independent school budget is overspent and this is reflected in the budget forecast for next year.

2.8 Further Education

There is an increase in cost for this year due to some additional cost at Independent Specialist Providers.

2.9 Castle@Theale Secondary SEMH Provision

Castle@Theale costs will increase in 2025-26 as a further twelve pupils will be admitted. The Castle @ Theale have agreed to create an additional 6 places to reduce the need for independent school places. The provision is very cost effective compared to alternatives in the independent sector and unit costs are continuing to reduce as the provision fills up.

2.10 Kennet Valley SEMH Provision

Kennet Valley costs will increase in 2025-26 as a further six pupils will be admitted. However, the provision is very cost effective compared to alternatives in the independent sector. An additional cost for staff cover has been incorporated for 25-26.

3 PUPIL REFERRAL UNITS (PRU) – STATUTORY

3.8 **Table 3** shows the budgets for PRU top ups.

TABLE 3	2024/25 Budget			2025/26	
	Budget £	Forecast £ (Month 10)	Over/ (under) £	Estimate £	Difference 24/25 budget & 25/26 prediction
PRU Top Up Funding (90625)	1,139,400	982,700	-156,700	1,196,370	+56,970
PRU EHCP SEMH Placements (90628)	1,045,800	1,330,404	284,604	1,255,470	+209,670
Non WBC PRU Top Up Funding (90626)	0	0	0		0
TOTAL	2,185,200	2,313,104	127,904	2,451,840	+266,640

3.9 The current year budget was based on the previous year's forecast. Schools Forum agreed to a 50% contribution from schools for pupils that they placed. Heads have requested that this contribution remains. Permanent exclusions are funded 100% by the High Needs Block less the average pupil led funding contribution recovered from schools. The estimate for 25/26 PRU Top Up Funding is based on the profile of pupils at iCollege in the summer term.

3.10 There is a current overspend of £284,604 this is due to the increased number of Pex EHCP learners iCollege is supporting.

3.11 The estimate forecast is based on this year's current project plus 5%.

3.12 The number of pupils with EHCPs being placed in PRUs is increasing as this can be an appropriate and cost-effective provision for some young people if they are not able to remain in their mainstream schools. A new provision for pupils with EHCPs was set up in autumn 2019, The Pod, and a further Pod Plus provision was set up in September 2021. These placements are usually more cost effective than independent and non-maintained special school placements.

3.13 A request for additional funding to increase the number of places available at ICollege was agreed by School Funding Forum for financial year 2023-24, this included extending provision at Pod Plus to eighteen at the Parson Down Infant site. In addition, twelve places for an intervention provision for Year 7 & 8 students at The Moorside Centre was agreed. Unfortunately, as premises were unable to be agreed in time for staff recruitment this provision was unable to start until April 2024.

4 OTHER STATUTORY SERVICES

Table 4 details the budgets for other statutory services.

TABLE 4 Other Statutory Services	2024/25 Budget			2025/26	
	Budget £	Forecast £ (Month 10)	Over/ (under) £	Estimate £	Difference 24/25 budget & 25/26 prediction
Applied Behaviour Analysis (90240) - This cost centre will be removed in 25/26	270,420	230,881	-39,539	0.00	-270,420
Education Other Than At School (EOTAS) (90573)	0	259,364	259,364	279,472	+279,472
Spot Purchase Alternative provision (90574)	0	135,100	135,100	376,092	+376,092
Sensory Impairment (90290)	296,460	296,460	0	251,220	-45,240
SEN Commissioned Provision (90577)	650,830	667,020	16,190	722,336	+70,506
Equipment for SEN Pupils (90565)	15,000	15,000	0	20,000	+5,000
Therapy Services (90295)	526,080	534,910	8,830	614,680	+88,600
Elective home Education Monitoring (90288)	49,480	44,250	-5,230	72,360	+22,880
Medical Home Tuition (90282)	381,690	304,600	-77,090	403,760	+22,070
Hospital Tuition (90610)	36,180	6,600	-29,580	36,180	0
SEND Strategy (DSG) (90281)	69,230	69,800	570	75,140	+5,910
Alternative Provision Co-ordinator	39,540	0	-39,540	42,640	+3,100
TOTAL	2,334,910	2,563,985	229,075	2,893,880	+558,970

4.1 **Applied Behaviour Analysis (ABA) / EOTAS and Spot Purchases of Alternative Provision**

This budget historically supported a small number of children with EHC Plans for whom the Authority had agreed an ABA programme. ABA is an intensive intervention programme for children with autism which aims to modify their behaviours, in order to allow children to function more successfully in school and in society. There are now fewer ABA programmes funded and this budget has been renamed to support the costs of children with EHC Plans accessing other bespoke packages where this is the most appropriate and cost-effective way of meeting their needs, including SEN Personal Budgets. This budget has been split into EOTAS and Spot purchases of Alternative provision. These budget needs to increase due to increasing numbers of children with SEN Personal Budgets. There is a significant overspend on this budget due to a number of high cost EOTAS packages have been awarded as part of tribunal appeals. It should be noted that SEN Personal Budgets can be a very cost-effective alternative to non-maintained and independent special schools, in particular for children who are emotionally based school avoiders, for whom they are increasingly being requested by parents. The budget for this cost centre needs to increase by £402,329.

4.2 **Sensory impairment** Support for children with hearing, visual and multi-sensory impairments is purchased from the Berkshire Sensory Consortium Service (SCS). This includes support from qualified teachers of HI and VI, audiology and mobility support. This budget has a small saving due to decreasing numbers of pupils needing SCS support.

4.3 **SEN Commissioned Provision (Engaging Potential)**

Engaging Potential is an independent special school commissioned to provide alternative educational packages for fourteen young people in Key Stage 4. Students placed at Engaging Potential are those who have EHC Plans for social, emotional and mental health difficulties and whose needs cannot be met in any other provision. This can include young people who have been excluded from specialist SEMH schools. An in-year increase of approximately £33K was agreed to this contract in 22-23 due to costings not having been revised for some years. The contract ended in August 2023, with the option to extend for a further two years. The contract has been extended for two years at an increased cost of £651,899 per annum, reflecting the need for increased staff ratios and enhanced salaries to address retention and recruitment issues. Premises costs have been added to the contract cost. Even at the higher cost for 2024-25, the unit cost of a place at £48,279 represents good value for money compared to other independent schools for SEMH. This contract is going through the commissioning process to be renewed.

4.4 **Equipment for SEN Pupils**

This budget is used to fund large items of equipment such as specialist chairs and communication aids for pupils with EHC Plans. The budget has been reduced a number of times in previous HNB savings programmes and was removed entirely in 2018-19 on the basis that schools would meet these costs. However, this created a pressure for

nurseries as they do not have delegated SEN budgets, and for resourced schools which have a disproportionate number of children with specialist equipment needs. It was agreed in 2018-19 that a budget of £10,000 would be made available to meet these needs. In 2019-20 it was agreed that the budget should be increased again to £15,000 as demand for equipment for children in nurseries and resourced schools was increasing. It is recommended that the budget increases to £20,000 and all mainstream schools are able to request funding for equipment over the cost of £500 as this has a very significant impact on school budgets especially for smaller primary schools.

4.5 Therapy Services (Contract with Berkshire Healthcare Foundation Trust)

The therapy services budget covers the costs for children with SEND who have speech and language therapy, occupational therapy or physiotherapy written in to their EHC Plans as an educational need.

Therapy services are provided by the Authority solely to children who have the need for a service stipulated and quantified in their EHC Plan. It is a statutory duty for the Local Authority to provide these therapies in these circumstances. The service is commissioned from the Berkshire Healthcare Foundation Trust.

The HFG / Schools Forum will be aware from previous reports that this service was retendered in April 2023 and is now jointly commissioned with Reading Borough Council and Wokingham District Council. This exercise resulted in an increase in cost due to higher numbers of children with therapies written in to their EHCPs as an educational need (in line with generally higher numbers of children with EHCPs), the need to provide therapies for The Castle@Theale and the need to provide capacity for therapists to assist the Local Authority in defending cases which go to the SEND Tribunal.

In addition, costs in this budget have risen because of the need to provide access to therapies in the new Westwood Farm SEND Resource and in the new SEMH Resource at Kennet Valley.

4.6 Elective Home Education (EHE) Monitoring

Local Authorities have a statutory duty to monitor Elective Home Education (EHE) arrangements made by parents and to ensure that all children are receiving a suitable education. Oversight of EHE monitoring falls under the Education Welfare and Safeguarding Service. Currently, the Elective Home Education Officer role is filled at 0.6 full-time equivalent (FTE). Budget has been allocated to expand this role to a full 1.0 FTE position; however, full recruitment to this role has been delayed due to the need for internal backfill of a substantive post.

4.7 Medical Tuition Service

The Medical Tuition Service (formerly known as the Home Tuition Service) is a statutory program dedicated to providing educational support, including in-home tuition, to students who are unable to attend school full-time due to medical conditions or illnesses. In the 2022-23 fiscal year, the program's budget was increased to ensure the Local Authority fulfils its obligations to children unable to attend school for health-related reasons. This year, savings have been realised due to recruitment delays. However, demand for this service continues to grow as it supports all pupils covered under Section 19 and responds to rising cases of mental health challenges among

children and young people, compounded by extended waiting times for additional support. The majority of referrals involve students facing ASD, anxiety, and other mental health barriers that hinder school attendance.

This year has focused on stabilising and enhancing the service through process improvements, expanding educational offerings, and fostering closer collaboration with schools to enhance educational support. Key developments include transitioning staff to permanent contracts and conducting a comprehensive review of emerging issues within Section 19 provision. This review will inform future decisions regarding referral pathways and support services, which may impact future budget requirements. While no immediate financial adjustments are anticipated, it remains premature to project future budgetary needs given the pending decisions on how best to fulfil statutory obligations.

The service places a particular emphasis on supporting students with Education, Health, and Care Plans (EHCP) and those with significant anxiety, including the co-ordination of EOTAS packages where there is no appropriate provision for a pupil. This work goes beyond traditional teaching, which is how the service has been established, to include critical skills in re-engagement, integration, and coordination of educational packages for EOTAS, areas that have previously been under-resourced within the team. To meet the wide-ranging needs of our students, we have now appointed a full-time qualified SENCO, providing the team with enhanced capabilities to support the broad spectrum of needs within the service. There will be a requirement for this area to be further developed and supported.

4.8 Hospital Tuition

The Local Authority is obliged to pay the educational element of specialist hospital placements, usually for severe mental health issues. These placements are decided by NHS colleagues and we have no influence over the placement or duration of stay. As numbers and costs are impossible to predict, it is proposed that the 2025-26 budget remains the same as 2024-25.

4.9 SEND Strategy Officer

In 2019-20 the Schools Forum agreed to fund a SEND Strategy Officer for three years initially to support implementation of the SEND Strategy 2018-23. Agreement was given by the Schools Forum in October 2020 that this post could be made permanent in order to attract and retain candidates of a suitable calibre.

4.10 Alternative Provision / EOTAS Coordinator

It is proposed that an additional post of Alternative Provision / EOTAS Coordinator is funded in 25-26) in order to reduce pressure for specialist placements for children who have ceased attending school due to EBSA. Currently EBSA is a key driver of spend on independent specialist placements. This post would provide capacity to set up and oversee alternative packages of education where this is an appropriate alternative to a specialist placement. In many cases a package of support would meet with parental preference, potentially meet the child's needs better than a school placement and could be considerably more cost effective. The only current barrier to such arrangements is lack of capacity to organise packages and ensure they are suitably monitored. This post has been put on hold while all initiatives to support SEN students are reviewed by DBV.

5 NON-STATUTORY Services

5.1 **Table 5** details the non-statutory service budgets for 2024-25, predicted outturn, and estimates for 2025-26.

5.2 The table shows the budget for these services in 2025-26 assuming that the services continue and there are no changes to staffing levels. However, the effectiveness of non-statutory services is being considered as part of DBV and recommendations regarding non statutory services will be made by DBV officers and members of the Heads Funding Group. Should decisions be made to reduce or cease any non-statutory services, the 2025-26 HNB budget will be adjusted accordingly.

5.3 Table 5 currently includes ongoing funding for the “invest to save” initiatives agreed in 2022-23 and rolled forward in to 2023-24 and 2024-25, for an additional 0.4 teacher in the EDIT Team, an additional SEMH practitioner and extra iCollege places. These projects will be considered as part of the review of non-statutory services.

TABLE 5 Non Statutory Services	2024/25 Budget			2025/26	
	Budget £	Forecast £ (Month 10)	Over/(under) £	Estimate £	Difference 24/25 budget & 25/26 prediction
Language and Literacy Centres LALs (90555)	171,840	171,840	0	183,920	+12,080
Specialist Inclusion Support Service (90585)	50,000	50,000	0	50,000	0
PRU Outreach Service (90582)	61,200	61,200	0	61,200	0
Cognitive and Learning Team (90280)	363,830	319,500	-44,330	395,110	+31,280
ASD Advisory Service (90830)	248,800	248,800	0	273,440	+24,640
ASD Fund - Additional support	52,690	48,200	-4,490	52,690	0
Therapeutic Thinking (90372)	69,330	57,300	-12,030	76,700	+7,370
Vulnerable Children (90961)	50,000	0	-50,000	50,000	0
Vulnerable Children (90961)	129,400	119,400	-10,000	129,400	0
Early Development and Inclusion Team (90287)	68,950	65,000	-3,950	151,355	+82,405
Dingley's Promise (90581)	35,000	105,000	70,000	125,000	+90,000
Emotionally Based School Avoidance (EBSA)(90373)	139,240	136,710	-2,530	144,520	+5,280
additional invest to save projects	110,966	110,960	-6	110,960	-6
Transition project - part funded DBV	0	0	0	46,310	+46,310
Invest to save:					

0.4fte additional support EDIT team	28,190	0	-28,190	0	-28,190
SEMH Practitioner	43,560	26,700	-16,860	54,240	+10,680
Extension of i-college	90,000	90,000	0	90,000	0
TOTAL	1,712,996	1,610,610	-102,386	1,994,845	+281,849

5.4 Language and Literacy Centres (LALs)

The LALs provide forty-eight places per year for Year 5 students who have persistent difficulties with literacy and need an intensive programme delivered by a teacher qualified in specific literacy difficulties.

5.5 Specialist Inclusion Support Service

This service provides outreach support from West Berkshire's special schools to mainstream schools to support the inclusion of children with learning and complex needs in their local mainstream schools.

This budget has been subject to reductions in the previous financial years with the special schools providing the service absorbing the cost.

5.6 PRU Outreach

The PRU Outreach Service offers consultancy / outreach support mainly to students who have been attending the iCollege and are starting to attend a mainstream school. Schools may request outreach for any pupil causing concern but it is dependent on capacity.

5.7 Cognition and Learning Team

The Cognition and Learning Team (CALT) provides advice, support and training to mainstream schools to help them to meet the needs of children with SEN. Staff are experienced SENCOs with higher level SEN qualifications.

Many primary schools are reliant on this service to supplement their own SEN provision and expertise, especially schools where the Head has to function as SENCO or where there is an inexperienced SENCO.

This is a partially traded service. All schools receive a small amount of free core service, but the majority of support now has to be purchased by schools.

5.8 Autism Team

The Autism Team provides advice, support and training for mainstream schools on meeting the needs of children with Autism. The purpose of the service is to enable children with autism to be successfully included in mainstream schools wherever possible.

The context for this service is vastly increasing numbers of children with ASD diagnoses an Autism diagnosis and mainstream schools having more difficulty meeting the needs of these children. The majority of our placements in non-West Berkshire special schools, independent special schools and non-maintained special schools are for children with autism.

5.9 Vulnerable Children

The Vulnerable Children Fund is a budget used to help schools support their most vulnerable pupils on an emergency, unpredicted or short-term basis.

The budget was gradually reduced from £120K over a number of years. This has always been a well-used resource that helps schools support vulnerable pupils with complex needs.

It was agreed in 2020-21 that this budget would be increased, as an invest to save initiative, in order to support the roll out of Therapeutic Thinking in West Berkshire schools. This increase was further extended in 2021-22 and 2022-23 and was agreed as a permanent addition to the HNB budget, along with the Therapeutic Thinking post.

5.10 Early Development and Inclusion Team

The service comprises of 1.8 FTE Advisory Teachers who are specialists in early years and SEND. Children under five who are identified by Health professionals as having significant SEND are referred to this service. Staff may visit children in their homes (if they are not yet in an early year setting) in order to promote their educational development and model strategies and resources for parents to use to support their child's progress.

Where capacity allows, EDIT teachers also assist with the transition to early years settings and schools, providing support and training for staff to help them to meet the child's needs, and continuing to visit for a period of time to provide ongoing support and advice. They also help to coordinate support which the family is receiving from other professionals.

The service has been reduced in size in recent years from 3.4 FTE to 1.8 FTE – despite an increasing caseload year on year. An additional 0.4 post was agreed as an invest to save initiative in 2022-23 and 2023-24. In 2024-25, DBV have funded 0.90 FTE has enabled the service to:

- Ensure all children go straight onto caseload
- Support transition from pre-school to school
- Provide targeted support and additional training for settings
- Provide support to parents and carers

Continuation of the 0.90 FTE has been agreed by Neil Goddard as an invest to save for 2025-26 to continue the provision listed above.

5.11 Dingley's Promise

Dingley's Promise is a charitable organisation which provides registered early years education for children under five with SEND in West Berkshire, Reading and Wokingham. It is the only specialist early years SEND setting in the private, voluntary and independent early years sector in West Berkshire. It provides an alternative to mainstream early years settings, where experience and expertise in SEND can vary greatly. Parents are able to

take up their early years' entitlement at Dingley's Promise, rather than at a mainstream early years setting, if they wish. However, Dingley's Promise are only able to claim the standard hourly rate for providing the early years entitlement as mainstream settings, in spite of offering specialist provision, higher ratios and more one to one support.

In 2017-18, the service was running at a loss and there was a risk it would cease to be viable in this area without some Council funding. It was agreed in 2018-19 that a grant of £30,000 would be made to Dingley's Promise in order to maintain the service in this area.

Dingley's Promise has made a request for additional resources due to ongoing viability issues as a result of reduced charitable income and some large grants ending. Their annual running costs are £240,000 and they receive £100,000 in income from the Council including early years place funding, funding for one-to-one support for individual children and the £30,000 annual grant from the HNB. The balance of £140,000 has to come from fund raising. The organisation has reported reduced ability to achieve income through fund raising as well as an anticipated reduction in income in 2024-25 due to a large Children in Need grant ending. The West Berkshire centre is running at a loss and effectively being subsidised by centres in other areas.

It is therefore proposed that Dingley's Promise receive funding equivalent to special school bands for the children they support, this would be in an annual lump sum of £125,000. Dingley's Promise provides an essential service in West Berkshire for children under five with very complex needs. If the service ceased to be viable, there would be an increase in demand for maintained special school places, which are already in short supply, and there could be increased pressure for non-maintained / independent special school placements.

5.12 Emotionally Based School Avoidance (EBSA)

This support is divided into two separate pathways, a Local Authority led pathway for primary schools and school led provision for secondary schools. The aim of the EBSA team is to help schools reduce school-related anxiety, increase pupil attendance and/or their engagement in education, and to reduce the need for alternative provision.

5.13 Transition Project

As highlighted in the high needs block report at appendix B a Transitions Support Programme Pilot has been put in place by DBV. Additional funding to support this project is being requested from the HNB. More information will be available on this pilot via the DBV updates.

5.14 Invest to Save projects

Invest to Save projects in 2022-23, rolled forward to 2023-24, included a 0.4 FTE post in the EDIT Team, the early years training project, an SEMH practitioner and PRU places. This funding has continued and additional resources have been put in place via DBV. The effectiveness of these provisions will be reviewed as part of the DBV process.

These projects have been included in the budget but it is proposed that their continuation is considered as part of the review of funding of non-statutory services via DBV

Appendix B

Delivering Better Value (DBV) Programme Update

1. West Berkshire was successful in its DBV grant bid and received £1 million funding, commencing in April 2024, to implement a one year SEND improvement programme.

The purpose of the Delivering Better Value Programme is to improve the delivery of SEND services for children and young people whilst working towards financial sustainability. Any significant impact on financial trajectories through the DBV programme are anticipated to be delivered from September 2025 and have a cumulative effect over the following years.

The West Berkshire DBV Programme consists of two workstreams.

- DBV Workstream 1 - Clear communications with families and wider local area partners to support access to services and the SEND system when they need it.
 - DBV Workstream 2 - Enabling settings, schools and colleges to meet the diverse needs of their communities locally including complex emotional and mental health needs of CYP.
2. The DBV Programme sits within the SEND and Inclusion Strategy, 2024 to 2029, and is incorporated within its six priorities and enablers. Any actions within the DBV workstreams that are incomplete by 31 March 2025, will be subsumed into the overarching strategic areas and will continue to be monitored by the SEND Strategic Improvement Board.

Six priorities of the SEND and Inclusion Strategy 2024 - 2029	Enablers identified in the SEND and Inclusion Strategy
<ol style="list-style-type: none"> 1. Early Years 2. Early Intervention 3. Inclusion 4. Developing local specialist provision & support 5. Strengthening alternative provision and support 6. Preparation for Adulthood 	<ul style="list-style-type: none"> • To develop a digital strategy which enables us to collect, use & share data more effectively; and to develop a digital dashboard enabling leaders' effective oversight. • Work with Public Health, and other partners, to improve the SEND content of the Joint Strategic Needs Assessment (JSNA) to enable the local area to better meet need in the future. • Explore opportunities to digitise Education, Health and Care Plans (EHCPs). • Develop a commissioning and quality assurance resource and function to support the placements of children and young people with SEND. • Work effectively with our partners to improve governance and oversight of SEND provision. • Support the development and expansion of the newly created West Berkshire Parent/Carer Forum ensuring that leaders can respond to the views of children & young people and their families.

	<ul style="list-style-type: none"> • Enhance the work to support the SEND Youth Forum, ensuring that leaders can respond to the views of children and young people. • Ensure the most efficient use of limited financial resources in the High Needs Block of funding.
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<p>DBV Workstream 1 – Objective: Clear communications with families and wider local area partners to support access to services and the SEND system when they need it.</p> <p>Approach listed below:</p>	<p>What has been delivered in West Berkshire since April 2024</p>
<p>Mapping existing services across agencies</p>	<ul style="list-style-type: none"> • Cross-agency gap analysis has been completed in relation to the Universal and Targeted Offer in conjunction with health colleagues – e.g. review of the support available around Autism, pre and post diagnosis. • Through the summer and Autumn Term work has continued on our “plans on a page” demonstrating a balanced model offer of services. Parent/carer friendly plans on a page are to be published in January 2025 on the Local Offer to confirm access routes to services available. • Gaps in offers are being identified and will be commissioned or co-commissioned as necessary and the Local Offer updated. • A joint initial workshop was held with health colleagues on 30th October following a gap analysis of local plans on a page produced by Education, Health and Social Care services. The ICB held an online event on 22nd October to update on changes to referral processes for ASD and ADHD services using the “needs led” approach. Implications of these changes will be fed into the gap analysis work. A further meeting is scheduled in February 2025 to jointly address issues raised. • The new Health ASD Pathway will now be launched in early 2025 and the ICB and WBC are working together to coproduce a more integrated ASD Pathway. • The migration of the Local Offer to a new platform has encountered some technical difficulties but the promotion of Local Offer
<p>GAP analysis</p>	
<p>Ensuring clear and current referral pathways are published for families & service users.</p>	

<p>Update and refresh the Local Offer to ensure accessibility for service users</p>	<p>to internal partners such as Library Services and Social Prescribers is underway.</p> <ul style="list-style-type: none"> • A revised homepage and improved keyword searchability went live in December. DBV funding supported short term increased capacity to progress SEND local offer developments in light of the migration.
<p>Communications Plan to relaunch updates to Local Offer to families and service users</p>	<ul style="list-style-type: none"> • A SEND Strategic Communications Plan encompasses both work under the DBV Programme and the wider SEND and Inclusion Strategy under the collective strapline: “Innovation in SEND.” • An ‘Innovation in SEND’ blog / web page published to showcase updates • Parent Champion Coram Programme promoting engagement with families • Communications with families and engagement with parents/carers has improved following the instigation of our Communications Plan and involvement with the Coram Programme. • SEND Blog: Innovation in SEND - West Berkshire Council – continues to provide regular updates on SEND developments - . “You said we did” Local Offer. It now has ten posts with updates regularly scheduled to showcase developments and milestones e.g. 4th November Blog – Response to

	<p>West Berkshire SEND Local Offer Survey (Appendix 3). The govDelivery newsletter is linked to the Innovation in SEND blog - pushing out the blog post to subscribed residents who are alerted via email whenever a new blog is published. Newsletter analytics are helping us to track reach and engagement. In addition, the Council social media channels are utilised regularly to promote Innovation in SEND blog/activity.</p> <ul style="list-style-type: none"> • Recruitment and training of our first cohort of parent/carer volunteers to the Coram programme is underway. Coram Parent Champion Training has taken place at Central Family Hub on 14th, 21st November and 5th December. • Our last newsletter was read by 92 residents, increasing month on month. • Current Subscribers to Blog Bulletin – 114 (Dec 2024) • The Coram Programme has now launched two cohorts of parents trained and skilled in the Programme delivery. • Parent/Carer Forum (PCF) are increasingly involved in co-production activities in relation to DBV Programme, represented at the SEND Strategic Improvement Board and co-producing specific projects e.g. Parent friendly plans on a page guide for services under development. • Parent Carer Forum Membership has increased from 4 in April 2024 to 42 in November 2024 and regular meetings are underway.
<p>Creating a digital dashboard to measure performance and inclusivity.</p>	<ul style="list-style-type: none"> • A public facing dashboard is being developed for the Local Offer (February 2025) • A Data Dashboard with glossary and briefing paper regularly informs the SEND Strategic Improvement Board. This will eventually include Health data to support a Local Area Dashboard.

<p>DBV Workstream 2 - Objective: Enabling settings, schools and colleges to meet the diverse needs of their communities locally including complex emotional and mental health needs of CYP Approach listed below:</p>	<p>What has been delivered in West Berkshire since April 2024</p>
<ul style="list-style-type: none"> • Whole School Mental Health Project 	<ul style="list-style-type: none"> • Stage 1 of the new Attachment Aware and Trauma-Informed Mental Health Project (AATIMHP) has commenced. The aim of the programme is to develop relational, attachment-aware and trauma-informed practice in schools, this is turn will: - • Improve pupil inclusion, belonging and mental wellbeing • Upskill staff in supporting young people • Reduce need for high-level intervention such as suspension and exclusion • Increase attendance and engagement • Provide a framework to support schools • Provide initial evidence to support an updated WBC approach to inclusion – both at school and LA level. • DBV grant is funding phase 1 only • There are a mixture 10 secondary and primary schools taking part in stage 1. • All schools have been audited in relation to Mental Health support in West Berkshire as whole and 48 schools responded. It will be used to ensure that schools’ needs are met as well as shaping our future support.
<ul style="list-style-type: none"> • Focus on supporting transitions into mainstream (Transitions Support Programme) to be led by schools and co-produced in clusters. 	<ul style="list-style-type: none"> • The Transition support documents for Early Years to Primary and Primary to Secondary have now been published and have been launched with schools. Parent friendly versions are to be published in January 2025. • Thirty-two Year 6 children have been identified to be additionally supported in January 2025. These children have been identified by our LA advisory services. They may or may not have an EHC plan but are at risk of having an unsuccessful transition into their next mainstream provision or may even be a risk of exclusion through unmet needs. They will access targeted direct/indirect support from additional

	<p>support workers jointly funded by the DBV Grant and the High Needs Block.</p> <ul style="list-style-type: none"> • The Early Years Transition Support Programme continues until March 2025 (DBV funded). The support programme extended the graduated offer by providing targeted visits for children not already known to the service and enhanced support for identified children as they transition into their mainstream school in September 2024.
<ul style="list-style-type: none"> • Undertaking a banding review of unit costs of mainstream, maintained special and alternative provision to ensure parity and alignment with local and national funding arrangements. • Delivering a pilot of updated banding system and impact analysis if review supports this. • Reviewing the use of element 2 funding in schools and settings to promote targeted intervention at SEND support through early identification of need and timely access to appropriate resources, reducing the need for EHC assessments 	<ul style="list-style-type: none"> • The SEND Funding Review will develop a fair, transparent and effective funding system for SEND. Part 1, a desk top review was completed in August and shared with schools on 7 October. The Mainstream working group is established, meeting monthly, and comprises of representatives from all phases of schools and LA officers. • The mainstream group has reviewed other LA Banded Funding models and frameworks and identified elements the group would like to see incorporated into a West Berkshire model which is being developed through co-production activities. • The Special School Group has developed a draft set of revised descriptors of need in relation to funding, having been developed based on other LA examples. • The working groups are developing guidance for schools on SEND Notional Funding in the Spring Term, along with early intervention models. There will be broader engagement work with SENDCos in February and March to help inform the actions needed. • This work will inform the revision of the Ordinarily Available guidance which will be completed by June 2025

<p>DBV Workstream 2 - Objective: Enabling settings, schools and colleges to meet the diverse needs of their communities locally including complex emotional and mental health needs of CYP</p> <p>Approach listed below: (contd.)</p>	<p>What has been delivered in West Berkshire since April 2024</p>
<ul style="list-style-type: none"> • Reviewing decision making processes to ensure transparency, consistency, and value for money. Decision making processes to be updated, where necessary, on the local offer. 	<ul style="list-style-type: none"> • 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. • Revisions in decision making processes are also codependent with the SEND funding review and delay in completing actions are due to the symbiotic relationship between the two processes
<ul style="list-style-type: none"> • Provide additional capacity to pilot Annual Reviews for Year 5/6s to support Transitions Programme 	<ul style="list-style-type: none"> • A new quality assurance tool for EHC plans – Invision 360, is being implemented in 2025 following recommendations from the SEND Funding Review. • Revision of Standard Operating procedures (SOPS) and Induction training for SEND Casework Team in data input under review • Additional resourcing to process transition Annual Reviews quickly to support Transitions Support Programme in place.
<ul style="list-style-type: none"> • Audit schools' additional SEND training needs through surveys, focus groups and case studies to create a plan to meet gaps in existing SEND training. 	<ul style="list-style-type: none"> • An audit of schools' training needs has been undertaken and an evaluation of impact of current LA support services is being completed and findings are used to develop future training offers for schools and settings.
<ul style="list-style-type: none"> • Ensure existing SEN support teams work in a more coordinated way (e.g. Explore a single point of access to triage requests to sign post, monitor and moderate demand) to ensure early intervention. • Multi-disciplinary teams to support schools (Transitions Support Programme) e.g. • Increase the Early Development and Inclusion Team (EDIT) capacity. • Increase the Autism Team capacity. 	<ul style="list-style-type: none"> • Early Years Transitions Support Programme delivered from Summer Term 2024 supported Early Years transition into Foundation 2 – EYSENIT team • The Key Stage 2/3 Transitions Programme has been co-produced with schools (Primary and Secondary SENCOs and Year 7 teachers) • Additional ASD and SEMH support posts for transitions support pilot for year 5/6 pupils.

<p>DBV Workstream 2 - Objective: Enabling settings, schools and colleges to meet the diverse needs of their communities locally including complex emotional and mental health needs of CYP</p> <p>Approach listed below: (contd.)</p>	<p>What has been delivered in West Berkshire since April 2024</p>
<ul style="list-style-type: none"> • Ensuring and supporting data analysis to inform development of sufficiency strategy. • <i>Enabler in SEND and Inclusion Strategy: - To develop a digital strategy which enables us to collect, use & share data more effectively; and to develop a digital dashboard enabling leaders' effective oversight</i> 	<ul style="list-style-type: none"> • The “SEND Placement Sufficiency Analysis 30 August 2024” has supported work on developing SEND capacity. By using this in combination with SCAP forecasts, short and medium terms capacity development activities are being prioritised to meet projected demand. • To ensure that there is sufficient capital funding to support proposed and future developments of additional resourced provision over the next 10 years, a single “SEND Strategy – Infrastructure Delivery revised Infrastructure Development” business case was submitted for approval by the Council and is going through the approval and governance process currently. • Specialist capacity development is a priority over the next three years. It is anticipated that an additional 12 place Mainstream Secondary Resourced Provision will be available for 2025/6. Additional provision is also being scoped for secondary Emotionally Based School Avoidance (EBSA) students to meet identified need. Medium term, increased specialist placements in local special schools are being pursued for 2026-2027 whilst additional primary and secondary resourced provision proposals are being developed with mainstream schools.
<ul style="list-style-type: none"> • Reviewing and updating of Strategic and Operational commissioning and procurement practices - include brokerage and contract management. • Stimulating markets, where necessary, to ensure appropriate and sufficient placement types are available for specialist and Alternative provision to meet current and anticipated demand. 	<ul style="list-style-type: none"> • Work is now underway to establish a robust children’s commissioning and brokerage function to ensure that children and young people gain access to the services that they need in a timely manner, as well as ensuring that the local authority can deliver value for money (November 2024-March 2025).

<ul style="list-style-type: none"> • Reviewing individual high-cost placement packages to ensure they meet need and remain value for money. • Reviewing of funding arrangements on all placements - joint children's services piece of work across social care and education - led by strategic commissioner. • Piloting multi agency funding system for high-cost placements and reviewing all Joint funding/commissioning arrangements with social care and health. 	<ul style="list-style-type: none"> • 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. • Arising out of the High-Cost Placement Review, a Commissioning and Brokerage Project has been accelerated using DBV funding to be delivered by March 2025. It will allow for: <ul style="list-style-type: none"> ○ Creation of a specialist commissioning and brokerage function for all children's placements. ○ Implementation of robust quality assurance and contract management ○ Commissioning function that ensures that the right services are commissioned at the right time. • Increased assurance that the council is operating efficiently and delivering value for money through its commissioning • A new CYPCC Joint Funding Panel (January 2025) has been established with Health to review high-cost cases that may require Continuing Health Care contributions.
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3. Funding Review

As part of the work of the DBV Programme, a review of SEND Funding is being undertaken. Phase 1 was a Desktop Review of funding arrangements during the Summer of 2024 and the report was circulated to schools in Sept 2024. Phase 2 of the SEND Funding Review has been initiated based on the recommendations from this report

A launch event for schools interested in finding out more was held on 7th October, and a number of schools from primary, secondary and special sectors have offered to become part of the Mainstream Schools working group. The first meeting of the working group was held 8th November, where the group will agree the way forward drawing on examples from other Local Authorities.

The Mainstream group is meeting monthly to develop and test the model and agree an implementation framework. Implementation is likely to be phased from September 2025, starting with new EHCPs.

The consultant who has been commissioned to support this work is also working with special schools to develop a simplified special school model and will be working with mainstream schools with designated units and resourced provisions to develop a simplified model to reflect that provision. Dependent on the progress of the work, this

element will be implemented partially in 2025/2026 and inform budgets for 2026 / 2027.

3.1 The aims of the project are:

- Develop a fair, transparent and effective funding system for SEND that supports and enables:
 - The right provision / support being in place at the right time as locally as possible linked to evidenced needs
 - The identification and sharing of effective and best practice and enabling it to become common practice
 - Improved parent / carer confidence in West Berkshire's local provision
 - Efficient and effective use of funding / resources.
- The intended outcomes of the project are:
 - A shared understanding of the range and levels of SEND needs of pupils across West Berkshire's schools and how that compares with other areas.
 - A shared understanding of the range and levels of needs of children and young people who have an EHCP maintained by West Berkshire.
 - A shared understanding of the strengths, issues, next steps and all partners' role in improving the local system.
 - Identification of potential changes to the current system.
 - Identification of other actions required to support implementation of a new system, including improvement in the quality and clarity of EHCPs.
 - A transparent and equitable system of resource allocation across West Berkshire.
 - Evidencing the impact of resourcing on children and young people's outcomes.
 - Identification of workforce development priorities.
 - Supporting specialist place planning.

The working group will report into the DBV task group who will feed into the SEND Strategic Improvement Board. The schools funding forum will be kept updated on the working group's progress.

4. DBV Impact on HNB Spend

4.1 The revised deficit forecast for the HNB: -

HNB Deficit	Mitigated	Unmitigated
2024-2025	£17,059,882	£20,863,699

4.2 The mitigated cost avoidance has been achieved by: -

- Capacity Development in maintained specialist provision, reducing the demand for Independent non maintained school placements.
- £1.5 clawback from schools – 2023-2024.

4.3 It is anticipated in future years that a reduction in spend through the DBV programme will be achieved by; -

- More children's needs being met without EHCPs.
- More children with EHCPs having their needs met in mainstream schools.
- More children with EHCPs having their needs met in local maintained specialist provision rather than in independent and non-maintained special schools.
- Reduced unit costs of specialist placements achieved through commissioning and market management.

4.4 However, the increasing number of maintained EHC plans continue to exert pressure on the system. On 9th December 2024, there were 1663 active EHC plans registered with a continued increase in demand for statutory assessments anticipated by the end of December 2024 and beyond. Further detailed work on the breakdown of EHC numbers and projections has informed short to medium term SEND place planning for 2025. Nationally, the number of children and young people with EHC plans increased to 576,000, as at census day in January 2024, up by 11.4% from 2023. The number of EHC plans has increased each year since their introduction in 2014.

4.5 The anticipated mitigations through the DBV Programme, and additional mitigations identified will have an impact on the unmitigated Deficit Management Plan (DMP) forecast of the High Need Block. The savings identified below reflect the demand trajectory for EHC plans over the next few years. and the mitigations against these impacting on the High Needs Block. These have been adjusted since the November DMP. Inaccurate EHCP figures impacted on Newton's /DfE original forecasts but following data cleansing activities over the last six months, a confirmed position has been arrived at. The most significant change from the previous version is that the EHCPs are now allocated to the right provision and therefore the unit cost is more accurate.

4.6 There has been a methodical approach to the mitigated and unmitigated values, however, the savings figures have yet to be validated which will occur before the DBV Programme quarter 4 submission to the DfE in April 2025.

	2025/26	2026/2027	2027/2028
DBV + additional mitigations savings	£8.2 million	£13.5 million	£19.3 million
Percentage of unmitigated deficit	16.8 %	16.47%	15.67%

The reduction in spend anticipated through the DBV Programme will be achieved through

- More children's needs being met without EHCPs
- More children with EHCPs having their needs met in mainstream schools
- More children with EHCPs having their needs met in local maintained specialist provision rather than in independent and non-maintained special schools.
- Reduced unit costs of specialist placements achieved through commissioning and market management.

The latest estimate of expenditure in the High Needs Block budget for both 2024/25 and 2025/6 is set out in Table 2. The figures are based on current and anticipated numbers of high needs pupils.

TABLE 1	2024/25 Budget £	2024/25 Forecast £	2025/26 Estimate £
Place Funding	6,458,520	6,458,520	7,190,603
Top Up Funding	24,495,610	25,611,000	30,161,070
PRU Funding (top ups only)	2,185,200	2,313,104	2,451,840
Other Statutory Services	2,334,910	2,563,985	2,893,880
Non Statutory Services	1,712,996	1,610,610	1,994,845
Support Service Recharges	213,480	173,697	175,072
Total Expenditure	37,400,716	38,730,916	44,867,310
HNB DSG Allocation	-29,153,266	-29,153,266	-30,825,286
0.25% Schools Block Transfer	-335,047	-335,047	
Clawback from schools	0	-1,518,292	
In year overspend	7,912,403	7,724,311	14,042,024
HNB DSG Overspend from previous year	9,864,006	9,335,571	17,059,882
Total cumulative deficit	17,776,409	17,059,882	31,101,906

Appendix C

Historical Data Outturn

TABLE A			
Top Up Funding	2021/22 £	2022/23 £	2023/24 £
Special Schools Maintained (90539)	4,985,051	5,233,228	5,676,186
Non WBC special schools (90548)	955,003	524,418	445,499
Non WBC free schools (90554)	0	535,617	660,692
Resource Units Maintained (90617)	321,587	317,407	655,772
Resource Units Academies (90026)	930,495	993,556	1,378,364
Resource Units Non WBC (90618)	207,271	131,516	95,738
Mainstream Maintained (90621)	974,686	1,182,597	1,687,494
Mainstream Academies (90622)	580,039	640,595	928,159
Mainstream Non WBC (90624)	174,581	169,046	152,115
Non Maintained Special Schools (90575)	851,541	875,863	1,092,852
Independent Special Schools (90579)	3,072,415	3,683,566	4,965,814
Further Education (90580)	1,175,012	1,149,072	1,628,914
Disproportionate HN Pupils (90627)	51,609	86,321	194,565
SEMH provision at Theale (90556)	0	765,987	986,986
SEMH provision at Kennet Valley (90557)	0	0	1,319
TOTAL	14,279,289	16,288,789	20,550,468

TABLE B			
PRU Funding	2021/22 £	2022/23 £	2023/24 £
PRU Top Up Funding (90625)	861,561	902,512	959,950
PRU EHCP SEMH Placements (90628)	755,402	927,182	1,084,765
TOTAL	1,616,964	1,829,694	2,044,715

TABLE C			
Other Statutory Services	2021/22 £	2022/23 £	2023/24 £
Applied Behaviour Analysis (90240)	196,912	246,773	335,102
Sensory Impairment (90290)	229,972	250,722	264,955
SEN Commissioned Provision (90577)	572,815	622,999	654,469
Equipment for SEN Pupils (90565)	8,090	16,231	-872
Therapy Services (90295)	335,164	329,133	490,251
Home Tuition (90315)	0	0	0
Elective home Education Monitoring (90288)	21,889	26,123	33,084

Medical Home Tuition (90282)	151,500	202,609	208,124
Hospital Tuition (90610)	53,847	34,000	5,055
SEND Strategy (DSG) (90281)	51,381	56,157	66,653
TOTAL	1,621,570	1,784,747	2,056,821

Table D Non Statutory Services	2021/22 £	2022/23 £	2023/24 £
Language and Literacy Centres LALs (90555)	122,000	187,553	161,690
Specialist Inclusion Support Service (90585)	50,000	50,000	50,000
PRU Outreach Service (90582)	61,200	61,200	61,200
Cognitive and Learning Team (90280)	324,416	328,257	345,230
ASD Advisory Service (90830)	206,627	268,046	282,703
Vulnerable Children (90961)	168,232	178,980	112,558
Early Development and Inclusion Team (90287)	57,817	86,663	91,294
Dingley's Promise (90581)	30,000	30,000	30,000
Therapeutic Thinking (90372)	53,272	52,457	30,986
Emotional Based School Avoiders (WBC managed)	65,623	123,879	105,075
Emotional Based School Avoiders (School managed)	99,585	99,864	111,199
Early Years Speech & Language (Invest to Save)	0	7,665	12,290
SEMH Practitioner (invest to save)	0	14,497	25,482
TOTAL	1,238,772	1,489,061	1,419,707

TABLE E	2021/22			2022/23			2023/24		
Place Funding	pupil numbers	planned places	£	pupil numbers	planned places	£	pupil numbers	planned places	£
Special Schools – pre 16 (90540)	440	286	2,860,000	448	286	2,860,000	409	286	2,860,000
Special Schools – post 16 (90546)		79	790,000		79	790,000		79	790,000
Resource Units Maintained – pre 16 (90584)	31	35	226,000	32	35	222,000	33	35	238,000
Special Schools and PRU Teachers Pay & Pension			312,046			304,690			324,864
Mainstream Maintained post 16 (90551)	11	6	34,000	6	6	36,000	16	6	36,000
PRU Place Funding (90320)	84	66	660,000	72	66	660,000	72	66	660,000
TOTAL			4,882,046			4,872,690			4,908,864

Delivering Better Value Programme- February 2025 update

Report being considered by: Schools' Forum
Date of Meeting: 10th March 2025
Report Author: Hester Collicut
Item for: Information **By:** All Forum Members

1. Purpose of the Report

1.1 This report provides an overview of the progress of the DBV Programme in West Berkshire in accordance with the report submitted to the Department for Education, reporting on progress made in the third quarter of the grant year, September-December 2024.

2. Introduction/Background

2.1 West Berkshire was successful in its DBV grant bid and received £1million funding, commencing in April 2024, to implement a one year SEND improvement programme. The programme’s original completion date was 31 March 2025; however, two projects that were delayed, will continue to be funded by the DBV grant until June/July 2025, subject to confirmation by the Department for Education.

2.2 The West Berkshire DBV Programme consists of two workstreams:

- **DBV Workstream 1 Objective** - Clear communications with families and wider local area partners to support access to services and the SEND system when they need it.
- **DBV Workstream 2 Objective** - Enabling settings, schools, and colleges to meet the diverse needs of their communities locally including complex emotional and mental health needs of CYP.

2.3 The DBV Programme sits within the SEND and Inclusion Strategy, 2024 to 2029, and is incorporated within its six priorities and enablers. Any actions within the DBV workstreams that are incomplete by 31 March 2025, will be subsumed into the overarching strategic areas and will continue to be monitored by the SEND Strategic Improvement Board.

3. Supporting Information

3.1

	Identified key areas of focus – Nov 2024	Activities and Outcomes
1.	Supporting work to develop SEND capacity in resourced and specialist-maintained provision in response to the sufficiency analysis.	<ul style="list-style-type: none"> • The “SEND Placement Sufficiency Analysis 30 August 2024” has supported work on developing SEND capacity. By using this in combination with SCAP forecasts, short and medium terms capacity development activities are being prioritised to meet projected demand. • To ensure that there is sufficient capital funding to support proposed and future developments of additional resourced provision over the next 10 years, a single “SEND Strategy – Infrastructure Delivery revised Infrastructure Development” business case was submitted for approval by the Council and is going through the approval and governance process currently. • Specialist capacity development is a priority over the next three years. It is anticipated that an additional twelve place Mainstream Secondary Resourced Provision will be available for 2025/2026. Additional provision is also being scoped for secondary Emotionally Based School Avoidance (EBSA) students to meet identified need. Medium term, increased specialist placements in local special schools are being pursued for 2026-2027 whilst additional primary and secondary resourced provision proposals are being developed with mainstream schools.
2.	Review and target resources at SEN Support and enhance the mainstream offer by developing practice guidance at points of transition, working with cohorts of pupils, and piloting the Mental Health Project in Schools.	<ul style="list-style-type: none"> • The Transition support documents for Early Years to Primary and Primary to Secondary have now been published and have been launched with schools. Parent friendly versions are to be published in January 2025. • Thirty-two Year 6 children have been identified to be additionally supported in January 2025. These children have been identified by our LA advisory services. They may or may not have an EHC plan but are at risk of having an unsuccessful transition into their next mainstream provision or may even be a risk of exclusion through unmet needs. They will access targeted direct/indirect support from additional support workers jointly funded by the DBV Grant and the High Needs Block.

		<ul style="list-style-type: none"> • The Early Years Transition Support Programme continues until March 2025 (DBV funded). The support programme extended the graduated offer by providing targeted visits for children not already known to the service and enhanced support for identified children as they transition into their mainstream school in September 2024. • Stage 1 of the new Attachment Aware and Trauma-Informed Mental Health Project (AATIMHP) has commenced. The aim of the programme is to develop relational, attachment-aware, and trauma-informed practice in schools, this is turn will: - <ul style="list-style-type: none"> ○ Improve pupil inclusion, belonging and mental wellbeing. ○ Upskill staff in supporting young people. ○ Reduce need for high-level intervention such as suspension and exclusion. ○ Increase attendance and engagement. ○ Provide a framework to support schools. ○ Provide initial evidence to support an updated WBC approach to inclusion – both at school and LA level. ○ DBV grant is funding phase 1 only. <p>There are a mixture ten secondary and primary schools taking part in stage 1.</p> • All schools have been audited in relation to Mental Health support in West Berkshire as whole and forty-eight schools responded. It will be used to ensure that schools’ needs are met as well as shaping our future support.
<p>3.</p>	<p>Complete the co-produced SEND Funding Review to deliver:</p> <ul style="list-style-type: none"> ➤ 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. 	<ul style="list-style-type: none"> • The SEND Funding Review will develop a fair, transparent and effective funding system for SEND. Part 1, a desk top review was completed in August and shared with schools on 7 October. The Mainstream working group is established, meeting monthly, and comprises of representatives from all phases of schools and LA officers. • The mainstream group has reviewed other LA Banded Funding models and frameworks and identified elements the group would like to see incorporated into a West Berkshire model which is being developed through co-production activities.

	<ul style="list-style-type: none"> ➤ 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. 	<ul style="list-style-type: none"> • The Special School Group has developed a draft set of revised descriptors of need in relation to funding, having been developed based on other LA examples. • The working groups are developing guidance for schools on SEND Notional Funding in the Spring Term, along with early intervention models. There will be broader engagement work with SENDCos in February and March to help inform the actions needed. • This work will inform the revision of the Ordinarily Available guidance which will be completed by June 2025 and link into work undertaken in the Supporting Inclusive Practice Task Group.
4.	<p>Developing commissioning and brokerage facilities and exploring opportunities with co-commissioning gaps in service with health partners.</p>	<ul style="list-style-type: none"> • Arising out of the High-Cost Placement Review, a Commissioning and Brokerage Project has been accelerated using DBV funding to be delivered by March 2025. It will allow for: <ul style="list-style-type: none"> ○ Creation of a specialist commissioning and brokerage function for all children's placements. ○ Implementation of robust quality assurance and contract management ○ Commissioning function that ensures that the right services are commissioned at the right time. ○ Increased assurance that the council is operating efficiently and delivering value for money through its commissioning
5.	<p>Ensure data and administrative systems are robust and effective in meeting increased demand by exploring opportunities presented by new technology and updated system processes</p>	<ul style="list-style-type: none"> • A Data Dashboard with glossary and briefing paper regularly informs the SEND Strategic Improvement Board. • A wider Inclusion Dashboard is also being developed to be published on the Local Offer. • A new quality assurance tool for EHC plans – Invision 360, is being implemented in 2025 following recommendations from the SEND Funding Review. • It had been anticipated that the EHC portal capita programme co-production work would be underway but current capacity in existing teams is delaying its implementation and its completion within initial time frames and is an area of risk.

<p>6.</p>	<p>Supporting the updating of The Local Offer to ensure it meets service user requirements.</p>	<ul style="list-style-type: none"> • The migration of the Local Offer to a new platform has encountered some technical difficulties but the promotion of Local Offer to internal partners such as Library Services and Social Prescribers is underway. • A revised homepage and improved keyword searchability went live in December. DBV funding supported short term increased capacity to progress SEND local offer developments in light of the migration. • Through the summer and Autumn Term work has continued on “plans on a page” demonstrating a balanced model offer of services. Parent/carer friendly plans on a page are to be published in January 2025 on the Local Offer to confirm access routes to services available. • A joint initial workshop was held with health colleagues on 30th October following a gap analysis of local plans on a page produced by Education, Health, and Social Care services. The ICB held an online event on 22nd October to update on changes to referral processes for ASD and ADHD services using the “needs led” approach. Implications of these changes will be fed into the gap analysis work. A further meeting is scheduled in February 2025 to jointly address issues raised. • The new Health ASD Pathway will now be launched in early 2025 and the ICB and WBC are working together to coproduce a more integrated ASD Pathway.
<p>7.</p>	<p>Continuing to develop parental /carer engagement through the Parent Carer Forum Coram Champion Programme.</p>	<ul style="list-style-type: none"> • Communications with families and engagement with parents/carers has improved following the instigation of our Communications Plan and involvement with the Coram Programme. • SEND Blog: Innovation in SEND - West Berkshire Council – continues to provide regular updates on SEND developments -. “You said we did” Local Offer. It now has eight posts with updates regularly scheduled to showcase developments and milestones e.g. 4th November Blog – Response to West Berkshire SEND Local Offer Survey .The govDelivery newsletter is linked to the Innovation in SEND blog - pushing out the blog post to subscribed residents who are alerted via email whenever a new blog is published. Newsletter analytics are helping us to track reach and engagement. In addition, the Council social media channels are

		<p>utilised regularly to promote Innovation in SEND blog/activity.</p> <ul style="list-style-type: none"> • Recruitment and training of our first cohort of parent/carer volunteers to the Coram programme is underway. Coram Parent Champion Training has taken place at Central Family Hub on 14th, 21st November, and 5th December. <ul style="list-style-type: none"> ○ Our last newsletter was read by ninety-two residents, increasing month on month. ○ Current Subscribers to Blog Bulletin – 114 (Dec 2024) ○ The Coram Programme has now launched two cohorts of parents trained and skilled in the Programme delivery. • Parent/Carer Forum (PCF) are increasingly involved in co-production activities in relation to DBV Programme, represented at the SEND Strategic Improvement Board and co-producing specific projects e.g. Parent friendly plans on a page guide for services under development. <ul style="list-style-type: none"> ○ Parent Carer Forum Membership has increased from 4 in April 2024 to 42 in November 2024 and regular meetings are underway.
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4. Options for Consideration

- 4.1 The DBV Programme should be completed by 31 March 2025, however as stated previously, some activities will extend into the Summer Term 2025. All DBV Grant Funding will cease by July 2025.
- 4.2 Engagement of Primary, Secondary mainstream schools, Academies and Special Schools in the SEND Funding Review and pilot Mental Health Programme shows a commitment to the urgent need to drive reform in this area with co-production at the heart of the programmes.
- 4.3 The membership of the PCF is increasing but active engagement to promote co-production is limited due to the capacity of lead members of the PCF. The Coram programme is increasing capacity for engagement with the wider community and the PCF is continuing to be supported closely by the Local Authority.
- 4.4 The Innovation in SEND Delivery plan records in detail progress towards key milestones in the SEND and Inclusion Strategy 2024-2029 which encompasses the DBV Programme.
- 4.5 The systemic changes required to drive improvement in SEND delivery are often co-dependent and progress in one area is reliant and developments in another. Schools

are very engaged with the SEND Funding Review however the development and consultation process is taking longer than initially anticipated. Therefore, it is now anticipated that the new mainstream model shall start to be implemented in September 2025. The Special School implementation may be delayed until April 2026.

- 4.6 The revision and updating of the Ordinarily Available Guidance are interconnected and co-dependent on the SEND funding review and therefore its production is in part, dependant on progress in this area. In addition, revisions in decision making processes are also codependent with the SEND funding review and delay in completing actions are due to the symbiotic relationship between the two processes.
- 4.7 The Targeted Transition Support Programme commences in January 2025 for thirty-two identified Year 6 pupils. These children will be supported into secondary mainstream. The children are from a substantial number of different schools, so the team's work is over a wide geographical area. The pilot enhanced transitions support programme of 6/7 will now run until December 2025, co-funded with schools, and therefore evaluation of this Programme will be delayed.
- 4.8 The AATIMHP (Mental Health Project in Schools) Phase 1, will now be completed in June/July due to initial recruiting difficulties.
- 4.9 The increasing number of maintained EHC plans continue to exert pressure on the system. On 9th December 2024, there were 1663 active EHC plans registered with a continued increase in demand for statutory assessments anticipated by the end of December 2024 and beyond. Further detailed work on the breakdown of EHC numbers and projections has informed short to medium term SEND place planning for 2025.
- 4.10 A review of previous data on original EHC numbers /types of need and placement type has required a revision of the Deficit Management Plan (DMP) submitted with the second quarter return. Inaccurate EHCP figures impacted on Newton's original forecasts but following data cleansing activities over the last six months, a confirmed position has been arrived at. The most notable change from the previous version is that the EHCPs are now allocated to the right provision and therefore the unit cost is more accurate.
- 4.11 The DSG Position (pre recoupment total in 2024-2025 is £15,766,217 deficit following mitigation. (Unmitigated £20,863,699). This includes a brought forward deficit of £945,756 including the Schools Block Transfer for 2024-2025.

5. Proposals

- 5.1 Key recommendations from the initial work undertaken by the SEND Funding review have accelerated focus on improving quality of EHC plans.
- 5.2 Due to service re-design and staffing capacity in the ICB, the combined data dashboard and development of gap analysis etc of service offers has delayed delivery. However, better working relationships arising from strong leadership at the SEND Strategic Improvement Board has meant that delays are highlighted, and issues raised when they occur.

- 5.3 The SEND Dashboard continues to be updated, and the priority remains to incorporate health information into a single dashboard. This will inform the SEND Strategic Improvement Board. Currently the Designated Clinical Officer (DCO) shares quarterly data updates with Local Authority. However, the quality of this information has been poor and submission inconsistent. This is being addressed and monitored through the SEND Strategic Improvement Board.
- 5.4 Work on an Inclusion dashboard will be prioritised in January /February 2025 for eventual publication on the Local Offer.
- 5.5 Work to establish a Commissioning and Brokerage function across Children's Services will be completed in March 2025. This will support improved quality assurance processes of providers, and the expansion of the alternative provision offer. Access to investment through transformation funding is essential to secure this activity.
- 5.6 **Governance** - From April 2025 the DBV Workstreams will be further incorporated into the Six Strategic Priority Area Task Groups. The DBV Task Group will cease, and new SEND Accountability Board will be established and report into the SEND Strategic Improvement Board.

6. Conclusion

- 6.1 The purpose of the national DBV Programme is to support local authorities and their local area partners to improve the delivery of SEND services for children and young people whilst working towards financial sustainability. In West Berkshire, the £1 million grant of the DBV Programme has instigated and accelerated significant improvement in SEND services by building capacity in the system to implement a change management programme embedded in the SEND and Inclusion Strategy, 2024-2029.
- 6.2 The pressures that are felt nationally, continue to exert demands on the system locally e.g. the increasing number of maintained EHC plans. Capacity of existing SEND teams to meet increasing demand remains a risk for the delivery of statutory services, including meeting 20-week deadlines for completion of EHC assessments and undertaking statutory requirements in relation to Annual reviews.
- 6.3 The High Needs Block mitigated forecast for 2024/2025 is £15.7 million¹.
- 6.4 The anticipated mitigations through the DBV Programme, and additional mitigations identified will have an impact on the unmitigated Deficit Management Plan (DMP) forecast of the High Need Block. The savings identified below reflect the demand trajectory for EHC plans over the next few years. and the mitigations against these impacting on the High Needs Block. These have been adjusted since the November DMP. Inaccurate EHCP figures impacted on Newton's original forecasts but following data cleansing activities over the last six months, a confirmed position has been arrived at. The most notable change from the previous version is that the EHCPs are now allocated to the right provision and therefore the unit cost is more accurate.

¹ Deficit Management Plan – December 2024 update

6.5 There has been a methodical approach to the mitigated and unmitigated values, however the savings figures have yet to be validated which will occur before quarter four submission in April 2025.

Deficit Management Plan	2025/26	2026/2027	2027/2028
Unvalidated DBV savings + additional mitigations savings per year	£9.1 million	£15.33 million	£21.73 million

6.6 The element of reduction in spend anticipated through the DBV Programme and additional mitigations will be achieved through: -

- More children’s needs being met without EHCPs.
- More children with EHCPs having their needs met in mainstream schools.
- More children with EHCPs having their needs met in local maintained specialist provision rather than in independent and non-maintained special schools.
- Reduced unit costs of specialist placements achieved through commissioning and market management.

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Update on Safety Valve Programme – January 2025

Report being considered by: Schools' Forum on 10th March 2025
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.

2. Recommendation

2.1 The Schools' Forum notes the report.

3. Introduction/Background

3.1 In October 2024, Heads Funding Group and Schools Forum requested updates on the Safety Value Programme only if there was a meaningful change to the programme.

4. Supporting Information

4.1 As of July 2024, there were thirty-eight local authorities in the Safety Valve programme.

4.2 On 5 December 2024, the Department for Education confirmed that the Government will not enter any more safety valve agreements with councils in financial difficulty over their SEND budget, "pending wider reform of the whole system to prioritise early intervention".

4.3 The Government confirmed that while it will continue to collaborate with local authorities with existing agreements to deliver their plans, it will not be entering any new ones.

5. Proposals

5.1 That the Schools' Forum note the report.

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Deficit Schools

Report being considered by: Schools Forum on 10th March 2025

Report Author: Lisa Potts

Item for: Information **By:** All Maintained Schools Representatives

1. Purpose of the Report

This report provides details of the most recent financial forecasts received from each of the 10 schools with a licensed deficit, 4 schools that had previously informed West Berkshire Council (WBC) they now expect to end the 2024/25 financial year with an unlicensed deficit and 3 whose most recent forecasts show unlicensed deficit balances not previously reported to WBC.

2. Recommendation

2.1 That the report be noted.

3. Introduction/Background

3.1 Schools are permitted to set a deficit budget if they meet certain conditions. This is termed a licensed deficit. The conditions of a licensed deficit are set out in the Scheme for Financing Schools (the legal contract the Council has with schools) and include the following statement, "The recommended length over which schools may repay the deficit, i.e. reach at least a zero balance, with appropriate mechanism to ensure that the deficit is not simply extended indefinitely, is three years. The maximum length of repayment is five years."

3.2 If the conditions of the license are not met by the school, the Council has the power to issue a Notice of Concern, which ultimately could mean removal of a school's delegation.

3.3 During the financial year some schools enter an unplanned financial deficit due to circumstances beyond the school's control. For example, higher than budgeted spend on Special Education Needs (SEN), power costs etc., poor Ofsted outcomes that result in unplanned spend. Any school doing so is requested to abide by the conditions of the deficit.

4. Forecast year end position as at 31st December 2024 (period 9)

4.1 Ten schools submitted a WBC Deficit Budget License Application for the financial year 2024/25, all ten were granted a license (table 1a).

4.2 Six of the ten schools now forecast a smaller deficit at the end of the year than licensed, the remaining four expect to exceed their licence deficit

Deficit Schools

figure. The net position is currently £116,217 better than budgeted, although one school was unable to submit its Out of Hours Club forecast.

- 4.3 During the financial year an additional four schools have reported they expect to end 2024/25 with an unlicensed deficit balance (table 1b).
- 4.4 In addition, a further three schools that had not previously notified WBC Schools Accountancy that they were forecasting an unlicensed deficit have submitted forecasts at period 9 that show this is the case (table 1c).
- 4.5 The licence is granted for the deficit on the Main School Budget (MSB) but for the purposes of completeness the tables below show the balances on the Pupil Premium Grant (PPG) and the Out of Hours Club (OoHC) in addition to the MSB, as at the yearend any deficit on the second two is transferred to the MSB so increasing the deficit (final column in tables 1a,1b and 1c below).
- 4.6 One school with a licensed deficit is forecasting a deficit on their PPG and another of the licensed deficit schools is forecasting a deficit on its OoHC.

In 2023/24 there were 9 schools in this category and the total forecast deficit balance was (£691,580).

School Operating with a licenced deficit	Main School Budget (MSB)			Pupil Premium Grant (PPG)			Out of Hours Club (OoHC)			Forecast deficit on MSB as at P9 after deficits trfd from PPG or OoHC at year end
	2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	
	A	B	B-A=C	D	E	E-D=F	G	H	H-G=I	
Aldermaston Primary School	(£78,670)	(£63,632)	£15,038	£790	£697	(£93)			£0	(£63,632)
Brimpton Primary School	(£31,780)	(£31,740)	£40	£4,680	£2,324	(£2,356)	£2,170	£5,742	£3,572	(£31,740)
Hermitage Primary School	(£50,810)	(£19,521)	£31,289	£4,380	(£5,713)	(£10,093)	£420	£1,418	£998	(£25,234)
Kennet Valley Primary School	(£34,620)	(£37,578)	(£2,958)	£1,430	£1,294	(£136)	£0	£1,213	£1,213	(£37,578)
Pangbourne Primary School	(£145,328)	(£113,970)	£31,358	(£650)	£1,520	£2,170			£0	(£113,970)
Spurcroft Primary School	(£228,260)	(£168,254)	£60,006			£0	To follow		£0	(£168,254)
St Finians Primary School	(£66,930)	(£78,526)	(£11,596)			£0	£4,640	£4,384	(£256)	(£78,526)
St Josephs Primary School	(£182,490)	(£167,629)	£14,861	£100	£279	£179	£150	(£21,090)	(£21,240)	(£188,719)
St Johns & St Nicolas Federation	(£34,440)	(£2,516)	£31,924	£4,590	£4,999	£409	£1,680	£1,254	(£426)	(£2,516)
Woolhampton Primary School	(£18,230)	(£45,172)	(£26,942)	£920	£684	(£236)	£1,160	£3,498	£2,338	(£45,172)
Total Surplus/(Deficit)	(£871,558)	(£728,538)	£143,020	£16,240	£6,084	(£10,156)	£10,220	(£3,581)	(£13,801)	(£755,341)

Notes
1. Year end deficits on Pupil Premium and Out of Hours Clubs are automatically transferred to the Main School Budget at year end.
2. Figures in red parenthesis indicate a deficit balance or a worse forecast outcome than budgeted.

- 4.7 One of the four unlicensed forecast deficits that WBC Schools Accountancy had been informed about prior to the Period 9 submission is forecasting a small deficit on its PPG and two are forecasting small deficits on their OoHC.

In 2023/24 there were 2 schools in this category and their total forecast deficit balance was (£90,909).

Deficit Schools

Table 1b School	Main School Budget (MSB)			Pupil Premium Grant (PPG)			Out of Hours Club (OoHC)			Forecast deficit on MSB as at P9 after deficits trfd from PPG or OoHC at year end
	2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	
	A	B	B-A=C	D	E	E-D=F	G	H	H-G=I	
Forecasting to end financial year with an unlicensed deficit										
WBC Schools Accountancy had previously been made aware of deficit prior to P9 submission										
Birch Copse Primary School	£1,660	(£12,934)	(£14,594)	£940	(£354)	(£1,294)	£360	£0	(£360)	(£13,288)
Inkpen Primary School	£350	(£3,871)	(£4,221)				£0		£0	(£3,871)
The Kite Primary Federation	£3,360	(£77,471)	(£80,831)				£0	£240	£385	£145
Theale CE Primary School	£9,870	(£114,993)	(£124,863)				£0	£2,240	£1,467	(£773)
Total Surplus/(Deficit)	£15,240	(£209,269)	(£224,509)	£940	(£354)	(£1,294)	£2,840	£1,852	(£988)	(£209,623)

Notes
1. Year end deficits on Pupil Premium and Out of Hours Clubs are automatically transferred to the Main School Budget at year end.
2. Figures in red parenthesis indicate a deficit balance or a worse forecast outcome than budgeted.

4.8 One of the three unlicensed forecast deficits that WBC had not been informed about prior to the period 9 submission is forecasting a deficit on its OoHC.

In 2023/24 there were no schools in this category.

Table 1c School	Main School Budget (MSB)			Pupil Premium Grant (PPG)			Out of Hours Club (OoHC)			Forecast deficit on MSB as at P9 after deficits trfd from PPG or OoHC at year end
	2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	
	A	B	B-A=C	D	E	E-D=F	G	H	H-G=I	
Forecasting to end financial year with an unlicensed deficit										
WBC Schools Accountancy had not previously been made aware of deficit prior to the school's P9 submission										
Bucklebury Primary School	£0	(£10,994)	(£10,994)	£220	£15,073	£14,853			£0	(£10,994)
Enborne Primary School	£9,880	(£15,709)	(£25,589)							(£15,709)
Purley CE Primary School	£11,670	(£12,505)	(£24,175)	£15,460	£2,624	(£12,836)	£0	(£1,329)	(£1,329)	(£13,834)
Total Surplus/(Deficit)	£21,550	(£39,208)	(£60,758)	£15,680	£17,697	£2,017	£0	(£1,329)	(£1,329)	(£40,537)

Notes
1. Year end deficits on Pupil Premium and Out of Hours Clubs are automatically transferred to the Main School Budget at year end.
2. Figures in red parenthesis indicate a deficit balance or a worse forecast outcome than budgeted.

4.9 At the end of period 9 seventeen schools forecast deficits totalling (£1,005,501). In 2023/24 there were eleven schools, forecasting a total deficit balance of (£782,489).

Table 1d Summary of all forecast deficits as at end of P9	Number of schools	Main School Budget (MSB)			Pupil Premium Grant (PPG)			Out of Hours Club (OoHC)			Forecast deficit on MSB as at P9 after deficits trfd from PPG or OoHC at year end
		2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	2024/25 Budget	2024/25 P9 Forecast	Variance	
		A	B	B-A=C	D	E	E-D=F	G	H	H-G=I	
Schools with a licenced deficit Table 1a	10	(£871,558)	(£728,538)	£143,020	£16,240	£6,084	(£10,156)	£10,220	(£3,581)	(£13,801)	(£755,341)
Schools with an in year unplanned deficit - WBC Schools Accountancy informed prior to submission of P9 forecast Table 1b	4	£15,240	(£209,269)	(£224,509)	£940	(£354)	(£1,294)	£2,840	£1,852	(£988)	(£209,623)
Schools with an in year unplanned deficit - WBC Schools Accountancy not informed prior to submission of P9 forecast Table 1c	3	£21,550	(£39,208)	(£60,758)	£15,680	£17,697	£2,017	£0	(£1,329)	(£1,329)	(£40,537)
Total Surplus/(Deficit)	17	(£834,768)	(£977,015)	(£142,247)	£32,860	£23,427	(£9,433)	£13,060	(£3,058)	(£16,118)	(£1,005,501)

Notes
1. Year end deficits on Pupil Premium and Out of Hours Clubs are automatically transferred to the Main School Budget at year end.
2. Figures in red parenthesis indicate a deficit balance or a worse forecast outcome than budgeted.

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Dedicated Schools Grant Monitoring Report 2024/25 – Month 10

Report being considered by: Schools Forum on 10th March 2025

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 That the report be noted.

3. Introduction/Background

- 3.1 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.
- 3.2 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.

4. Supporting Information

- 4.1 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.
- 4.2 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.
- 4.3 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

4.4 There is a brought forward deficit on the DSG of £9.45m.

4.5 The forecast position at the end of January 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	Quarter 3 Forecast	Month 10 Forecast	Deficit/ (surplus)
£'000	£'000	£'000		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
			Expenditure:								
70,512	73,090	77,070	Schools Block (inc ISB)	79,518	(1,412)	78,106	79,518	79,518	78,106	78,106	(0)
9,899	10,240	11,325	Early Years Block	17,371	1,339	18,711	17,329	17,329	18,547	18,353	(358)
1,001	967	935	Central School Services Block	961	10	971	974	982	956	956	(15)
23,827	26,456	31,157	High Needs Block	35,823	(11)	35,812	34,927	35,942	37,347	37,185	1,373
0	0	0	High Needs Block In-Year deficit recovery	(7,881)	0	(7,881)	0	0	0	0	7,881
105,240	110,754	120,487	Total Expenditure	125,793	(74)	125,719	132,747	133,771	134,956	134,600	8,881
			DSG Grant Income:								
(70,293)	(72,937)	(77,005)	Schools Block	(79,518)	1,412	(78,106)	(78,106)	(79,518)	(78,106)	(78,106)	0
(9,834)	(10,102)	(11,115)	Early Years Block	(17,371)	(1,339)	(18,711)	(18,711)	(17,371)	(18,630)	(18,711)	0
(1,009)	(992)	(973)	Central School Services Block	(961)	(10)	(971)	(971)	(961)	(971)	(971)	0
(22,601)	(24,983)	(26,892)	High Needs Block	(27,942)	11	(27,931)	(27,931)	(27,942)	(27,931)	(27,931)	0
(103,737)	(109,014)	(115,985)	Total DSG Income	(125,793)	74	(125,719)	(125,719)	(125,793)	(125,639)	(125,719)	0
	(53)		In-year adjustments								
(103,737)	(109,067)	(115,985)	Total Income	(125,793)	74	(125,719)	(125,719)	(125,793)	(125,639)	(125,719)	0
			In year net deficit/(surplus):								
219	153	65	Schools Block	0	0	0	1,412	0	(0)	(0)	(0)
65	138	210	Early Years Block	0	0	0	(1,381)	(42)	(83)	(358)	(358)
(8)	(25)	(38)	Central School Services Block	0	0	0	2	21	(15)	(15)	(15)
1,227	1,474	4,265	High Needs Block	0	0	0	6,995	8,000	9,416	9,254	9,254
	(50)	39	Grant adjustment (re PPG)								
1,503	1,689	4,541	Net In-year Deficit	0	0	0	7,028	7,979	9,317	8,881	8,881
1,461	2,964	4,761	Deficit Balance in reserves	9,450		9,450	9,450	9,450	9,450	9,450	9,450
	108	148	In year reserve movement	0		0	94	94	94	94	94
	0	0	Clawback from Schools	0		0	0	0	(1,518)	(1,518)	(1,518)
2,964	4,761	9,450	Cumulative Deficit	9,450	0	9,450	16,572	17,523	17,343	16,907	16,907

4.6 The Month Ten forecast shows an in-year forecast deficit of £8.9m, against the in-year efficiency target. When added to the cumulative deficit of £9.45m, the forecast year end deficit on the DSG is £18.3m. Taking into account the clawback from Schools, this is reduced to £16.9m deficit.

4.7 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 £80k 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.

4.8 The Early Years Block has received some additional in-year funding due to two new funding streams. We are forecasting that further grant is due to be received for these funding streams which will see the current deficit decrease to under £1m.

4.9 Central Schools Services Block is showing a £15k saving, which is mainly due to an increase in fixed penalty notice income and a change to the grant level for 24/25.

4.10 The High Needs Block is currently showing a £1.3m overspend at Month Ten. There are pressures on top up funding for Independent Special Schools of £905k and £262k in Further Education. These are partly being off-set by reduced spend in Maintained Special Schools and Out of Area Special Schools top ups.

4.11 Ongoing pressures are being driven by an increase in the number of children identified requiring an assessment of EHCP.

4.12 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	(358)	904
Central School Services Block	1	0	(15)	(14)
High Needs Block	9,336	0	9,254	18,589
Clawback from Schools	0	0	(1,518)	(1,518)
Grant changes	(58)	0	0	(58)
Total Deficit Balance	9,450	94	7,363	16,907

5. Conclusion

5.1 The total forecast deficit on the DSG amounts to £16.9m, comprising £9.45m from previous years and a further £7.5m forecast overspend in year. The forecast position will be kept under review and updates provided to Schools' Forum.

5.2 These figures now include the clawback of funds from schools with excess balances

6. Appendices

Appendix A – DSG 2024-25 Budget Monitoring Report Month 10

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

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	-1,208,525	56,130,615	56,130,615	0	
DSG top slice	Academy Schools Primary	0		0	0	0	
90025	Secondary Schools (excluding 6th form funding)	21,226,730	-247,290	20,979,440	20,979,440	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 £80k underspend at M10
90349	DD - Behaviour Support Services	243,430		243,430	243,430	0	Forecast is £56k underspend at M10
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 M10
90423	DD - Statutory & Regulatory Duties	128,030		128,030	128,030	0	Forecast is £3,800 underspend at M10
90235	School Contingency - Growth Fund/Falling Rolls Fund	0	43,874	43,874	43,874	0	Forecast is £132,050 at M10 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	-1,411,941	78,105,789	78,105,789	0	
90583	National Copyright Licences	179,860		179,860	175,330	-4,530	
90019	Servicing of Schools Forum	46,250		46,250	44,200	-2,050	
90743	School Admissions	186,210		186,210	190,700	4,490	
90354	ESG - Education Welfare	179,900		179,900	155,500	-24,400	Additional Fixed penalty notice income
90460	ESG - Statutory & Regulatory Duties	271,250		271,250	298,160	26,910	Cost of Capita higher than estimated
90054	Surplus budget to off-set cumulative deficit	5,420	10,143	15,563	0	-15,563	
	SSR	92,425		92,425	92,425	0	
	Central School Services Block DSG	961,315	10,143	971,458	956,315	-15,143	
90010	Early Years Funding - Nursery Schools	1,140,380		1,140,380	1,113,635	-26,745	
90037	Early Years Funding - Maintained Schools	2,278,300		2,278,300	2,223,743	-54,557	
90036	Early Years Funding - PVI Sector	7,218,660		7,218,660	7,204,569	-14,091	
90052	Early Years PPG & Deprivation Funding	219,580		219,580	341,804	122,224	
90053	Disability Access Fund	90,090		90,090	30,000	-60,090	
90018	2 year old funding	3,646,040		3,646,040	4,598,519	952,479	
90023	Under 2's	1,886,860		1,886,860	3,005,715	1,118,855	
90017	Central Expenditure on Children under 5	414,060		414,060	382,660	-31,400	
90287	Pre School Teacher Counselling	68,610		68,610	68,610	0	
90238	Early Years Inclusion Fund	108,000		108,000	71,500	-36,500	
90054	Early Years adjustment re grant funding	218,295	1,339,170	1,557,465	-770,350	-2,327,815	Additional grant in-year for new funding streams plus £770k additional grant due
	SSR	82,458		82,458	82,458	0	
	Early Years Block Total	17,371,333	1,339,170	18,710,503	18,352,863	-357,640	

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

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	1,211,950	-47,610	
90539	Special Schools - Top Up Funding	6,218,340		6,218,340	5,875,000	-343,340	
90548	Non WBC Special Schools - Top Up Funding	215,290		215,290	332,720	117,430	
90554	Non WBC free schools	618,120		618,120	643,960	25,840	
90556	SEMH provision at Theale	1,450,880		1,450,880	1,463,310	12,430	
90557	Kennet Valley Resource Unit	0	419,810	419,810	433,500	13,690	
90575	Non LEA Special School (OofA)	1,423,550		1,423,550	1,301,430	-122,120	
90579	Independent Special School Place & Top Up	7,389,410		7,389,410	8,294,710	905,300	
90580	Further Education Colleges Top Up	1,465,000		1,465,000	1,726,810	261,810	
90617	Resourced Units top up Funding maintained	1,095,930	-419,810	676,120	725,120	49,000	
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	2,006,980	185,980	
90622	Mainstream - Top Up Funding Academies	1,142,500		1,142,500	1,157,000	14,500	
90624	Non WBC Mainstream - Top Up Funding	140,380		140,380	153,340	12,960	
90625	Pupil Referral Units - Top Up Funding	1,139,400	90,000	1,229,400	1,072,700	-156,700	
90627	Disproportionate No: of HN Pupils NEW	150,000		150,000	224,740	74,740	
90628	EHCP PRU Placement	1,045,800		1,045,800	1,330,404	284,604	
	High Needs Block: Top Up Funding Total	26,680,800	90,000	26,770,800	28,014,104	1,243,304	
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	230,881	-39,539	
90573	Education Other Than At School (EOTAS)	0		0	259,364	259,364	
90574	Spot Purchases - Alternative Provision	0		0	135,100	135,100	
90280	Special Needs Support Team	363,830		363,830	319,500	-44,330	
90281	SEND Strategy (DSG)	69,230		69,230	69,800	570	
90282	Medical Home Tuition	381,690		381,690	304,600	-77,090	
90237	High Needs Contingency	240,500	-90,000	150,500	110,960	-39,540	
90286	Early Years Speech & Language	0		0	0	0	
90287	Pre School Teacher Counselling	97,140		97,140	65,000	-32,140	
90288	Elective Home Education Monitoring	49,480		49,480	44,250	-5,230	

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

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	296,460	0	
90295	Therapy Services	526,080		526,080	534,910	8,830	
90372	Therapeutic Thinking	69,330		69,330	57,300	-12,030	
90373	Emotional Based School Avoiders (EBSA)	139,240		139,240	136,710	-2,530	
90374	SEMH Practitioner	43,560		43,560	26,700	-16,860	
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	667,020	16,190	
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	6,600	-29,580	
90830	ASD Teachers	301,490		301,490	297,000	-4,490	
90961	Vulnerable Children	179,400		179,400	119,400	-60,000	
90581	Dingleys Promise	35,000		35,000	105,000	70,000	
	High Needs Block: Non Top Up or Place Funding	4,047,900	-90,000	3,957,900	4,084,595	126,695	
90054	Efficiency Target	-7,880,605	-11,001	-7,891,606	0	7,891,606	
	SSR	173,697		173,697	173,697	0	
	High Needs Block Total	27,942,312	-11,001	27,931,311	37,184,916	9,253,605	
	TOTAL DSG EXPENDITURE	125,792,690	-73,629	125,719,061	134,599,883	8,880,822	
90030	DSG Grant Account	-125,792,690	154,053	-125,638,637	-125,638,639	-2	
	Clawback from Schools				-1,518,292	-1,518,292	
	Early Years Budget Grant		-80,424	-80,424	-80,424	0	
	Net In-year Deficit	0	0	0	7,362,528	7,362,528	
	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	16,906,673	7,456,553	

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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	Gerard Strong / Kiki Hurford (supports procurement process only)	This contract is not funded from the DSG and is an Information item only. March 2025: The preferred option is to extend the contract with Rose Road for another year, and officers are currently awaiting confirmation from them on whether this is viable given increasing costs.
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)	Schools involved have been contacted and informed that that this will be handed back to schools to procure individually once the contract comes to an end.
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 Rebecca Page (supports procurement process only)	Information on the cost and continuation of this contract was included within the High Needs Block report considered at the Schools' Forum meeting on 20th January 2025.
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. Schools are advised that should they wish to leave the central energy contract, they will need to give notice in writing to energymanagement@westberks.gov.uk by 11 March 2025. This will mean that they will leave the central energy contract on 31 March 2026. Any schools interested in joining the contract should email energymanagement@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 (supports procurement process only)	A report was brought to the Schools' Forum meeting in October 2022 and the new therapy contract was agreed.

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