

# Notice of Meeting

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## Schools Forum

**Monday 20 January 2025 at 5.00pm**

Via Zoom

Date of despatch of Agenda: Tuesday 14 January 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 20 January 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 20 January 2025 (continued)**

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Sarah Clarke  
Service Director: Strategy and Governance

If you require this information in a different format or translation, please contact Sadie Owen on telephone (01635) 519045.

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

## **SCHOOLS FORUM**

### **MINUTES OF THE MEETING HELD ON MONDAY 2 DECEMBER 2024**

**Present:** Councillor Heather Codling (Executive Portfolio Holder: Children and Family Services), 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), Jon Hewitt (Maintained Special School Headteacher), Trevor Keable (Academy School Governor), Jo Lagares (Maintained Primary School Headteacher), Julie Lewry (Academy School Headteacher), 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:** Rose Carberry (Principal Adviser for School Improvement), AnnMarie Dodds (Executive Director - Children's Services), Melanie Ellis (Service Lead - Finance) ), Nicola Ponton (SEN Manager), Lisa Potts (Finance Manager), Jessica Bailiss (Democratic Services Officer) )

**Apologies for inability to attend the meeting:** Reverend Mark Bennet (Church of England Diocese), Nicolle Browning (Maintained Secondary School Headteacher), Keith Harvey (Maintained Primary School Headteacher), Beth Kelly (Head of Early Years), Jo MacArthur (Maintained Primary School Headteacher), Jamie Morton (Post 16 Representative), David Ramsden (Maintained Secondary Headteacher), Charlotte Wilson (Academy School Headteacher) and Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources)

#### **PART I**

##### **1 Minutes of previous meeting dated 14th October 2024**

The Minutes of the meeting held on 14<sup>th</sup> October 2024 were approved as a true and correct record and signed by the Chair.

##### **2 Actions arising from previous meetings**

It was noted that the one action from the previous meeting had been completed and an update was included.

Trevor Keable referred to the action that had been completed concerning the Equalities Impact Assessment (EIA) for the Schools' Funding Formula Consultation item. He commented that one of the questions raised had been whether or not the assessment process was correct or if there was a negative, positive or neutral impact. The argument raised had been that if there was no change for the Local Authority (LA), but a negative impact for schools if this would be marked as neutral in the EIA. He asked for this to be clarified. Melanie Ellis reported that she had consulted with the EIA Team at the LA and had also reviewed relevant information on the DfE website and had revised the EIA in accordance with this. Trevor Keable further asked if this revised version took account of

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the repercussions for the LA and schools. Melanie Ellis reported that it did however, no negative aspects had been identified.

### 3 **Declarations of Interest**

There were no declarations of interest received.

### 4 **Membership**

Jess Bailiss reported that an election for the two academy governor vacancies would be held in the new year. There were no further membership updates at this stage.

### 5 **School Funding Formula 2025/26 (Melanie Ellis)**

Melanie Ellis introduced the report (Agenda Item 6), which set out the results of the consultation with all schools on the proposed primary and secondary school funding formula for 2025/26. The results of the consultation were provided in various charts in the report.

Melanie Ellis drew attention to section 2.1 of the report, which set out the Local Authority's (LAs) recommendations and highlighted those where the Heads' Funding Group (HFG) recommendation differed to that of the LA. Section 2.2 of the report set out the recommendations from the HFG and it could be seen that the HFG's recommendation differed from that of the LA for recommendation (c) where the HFG was recommending a 0 percent block transfer, whereas the LA was recommending a transfer of 0.5 percent.

Melanie Ellis also drew attention to recommendation 2.2 (e) where it was set out that the HFG recommended that the services for de-delegation be agreed for 2025/26 however, recommended that a detailed review was commenced of de-delegations on a service-by-service basis, with a view to voting on each service separately for 2026/27.

Melanie Ellis went through the consultation results to each of the questions in detail, as set out in section five of the report. The key item for discussion by the Schools' Forum was regarding question three on the block transfer. In the consultation, 50 percent of schools had supported a transfer and the majority of these had supported a 0.25 percent transfer. 50 percent of schools had supported a 0 percent transfer.

Trevor Keable voiced his disappointment that only 25 percent of schools had responded to the consultation.

In relation to the block transfer, Edwin Towill commented that the HFG had been clear that it did not support a top slice to the Schools' Block. The consultation results from schools showed a clear split between no transfer and a 0.25 percent transfer. Only two schools that had responded to the consultation had supported a 0.5 percent transfer. Edwin Towill expressed that he was deeply concerned about taking money away from school budgets for two main reasons. Firstly, because if money was taken away from school budgets it would mean schools would not be able to fulfil responsibilities in supporting children with high needs. These responsibilities had increased exponentially over recent years and therefore a 0.25 or 0.5 percent transfer in his view would be prejudicial to young people in the community. The second reason was that he was worried the money would essentially disappear if transferred. There was a £13m projected overspend set out in the report for item eight on the High Needs Block (HNB), which highlighted a significant and increasing overspend, and Edwin Towill was concerned that there did not seem to be a plan in place for the problems facing the HNB. He therefore stated that he would not be minded to support a transfer.

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Trevor Keable supported comments raised by Edwin Towill and commented that because cuts had already been made to Education Welfare Officers (EWOs) and other similar professionals, his school (Denefield) had needed to spend more on support for pupils. It was important to recognise that schools were having to spend more just to retain the level of support required.

Neil Goddard stated that he understood the concerns raised and it was known that it was a national problem with LAs across the country struggling to meet the increase in demand on the HNB. Neil Goddard clarified that the deficit highlighted under agenda item eight (£13m) was for the next financial year 2025/26. This would lead to a cumulative deficit of about £30m, which equated to the annual HNB allocation.

Neil Goddard explained the impact on the LA of holding the deficit. Although the deficit in the HNB did not fall onto the LA's balance sheet, the LA did have to maintain the debt and pay the interest on it. It therefore impacted on what the LA was able to deliver and the reason why the LA would want to minimise the deficit as quickly as possible and not allow it to continue to escalate. Neil Goddard reported that Delivering Better Value (DBV) provided a plan and a detailed strategy. He accepted that plans such as the Special Educational Needs and Disabilities (SEND) Strategy were high level and that there was more work to do to form an overarching plan. The LA was under very close scrutiny from the DfE around DBV and what it was doing to manage the deficit. The impact from actions identified through DBV were not expected to be seen until 2025/26. If money was transferred from the Schools' Block to the HNB, then it would be targeted on the basis of need and potentially therefore have a greater level of impact. However, Neil Goddard fully accepted the pressures facing school budgets. The report helpfully set out discussions that had taken place at HFG and its proposals.

Lesley Roberts referred to discussions that had taken place at the HFG and highlighted that schools felt the impact of other decisions. Schools could not continue to manage with money being taken away continuously because needs in schools were increasing. Lesley Roberts felt that Council Members needed to be aware that many schools were unable to have full time staff due to having to cater for high needs. The impact on schools needed to be understood. Lesley Roberts acknowledged the pressure facing the LA but felt a transfer would further increase pressure on schools.

Paul Davey commented that school budgets were spread very thinly, and this was placing increasing pressure on staff and senior leadership teams. Paul Davey commented on a position advertised at his school for a full-time classroom teacher and that no application has been submitted in eight weeks. This would mean administration time would have to be taken away from the senior leadership team in order to provide teaching time and maintain the required standards. Paul Davey stated that if more money was taken from schools through a transfer, it would make the situation even more difficult. The acceleration of the rate that staff were being lost from the teaching profession would only increase, exacerbating the problems faced. A transfer would provide a short-term fix and would not resolve the fundamental issue that education was underfunded.

Edwin Towill clarified that the LA were expecting funding from Government for high needs that would lead to a 5.7 percent increase in funding. It was appreciated that this was not enough however, it needed to be taken into account. The indicative figures from Government for schools currently suggested that once increases in employer national insurance contributions were taken into account, the budget increase for schools would equate to one percent. Once other elements like increases in salaries had been taken into account it was likely schools would face going further into deficit. Edwin Towill supported previous comments raised that anything taken away from school budgets would immediately impact the front line and the children they served would be in crisis.

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The Chair invited the Schools' Forum to consider recommendations 2.1:

- (a) To mirror the Department for Education's (DfE) 2025/26 National Funding Formula (NFF) to calculate the funding allocations.
- (b) To address any surplus or shortfall in funding by adjusting the AWPU values.

It was proposed and seconded that recommendations 2.1 (a) and 2.1 (b) should be approved. At the vote with all school representatives the motion was carried.

The Chair invited the Schools' Forum to consider recommendation 2.1:

- (c) To apply a 0.5% top slice to schools' funding to support the HNB.

No proposal was put forward. Jon Hewitt stated that as a headteacher at a special school, which was funded from the HNB, it might be expected that he would be in support of this recommendation. He stated however that he did not support the recommendation because even a 0.5 percent transfer would be such a small amount and not make any difference. He concurred with concerns raised by other headteachers earlier in the discussion. Jon Hewitt stated that he questioned why funding was divided into blocks as it unhelpfully depicted special schools against mainstream schools and early years.

The Chair invited the Schools' Forum to consider an alternative proposal to that set out in 2.1 (c). Edwin Towill proposed that a transfer would not go ahead, and this was seconded by David Fitter. At the vote the motion was carried.

The Chair invited the Schools' Forum to consider recommendations 2.1:

- (d) To approve the criteria to be used to allocate additional funds.

It was proposed and seconded that the recommendation should be approved. At the vote with all Forum representatives the motion was carried.

The Chair proposed that the Forum consider recommendation 2.1 (e) following a discussion on the next item (Final De-delegations 2025/26). This was agreed. Following this discussion, the Chair invited the Schools' Forum to consider recommendation 2.1:

- (e) To approve the proposed services to be de-delegated.

It was proposed and seconded that the recommendation should be approved. At the vote with all maintained school representatives the motion was carried.

Trevor Keable asked if there was a LA response to the decision taken by the Forum on the transfer at the current stage. Neil Goddard stated that the decision taken by the Forum would be fed into and considered as part of the LA's budget setting process. As discussed previously, the LA could then take a view to appeal the decision by the Schools' Forum on the transfer to The Secretary of State. Clearly however the LA would want to reflect on the discussion and decision that had taken place at the Schools' Forum.

Neil Goddard confirmed that if an appeal was progressed, a formal process would be followed and all supporting information including the minutes and recording of the meeting at which the item was discussed, would be sent to the DfE for review. There was currently no indication that the decision would be appealed however, it was important that the options available to the LA were clear and that this would be considered by Members of the LA as part of the budget setting process. Councillor Heather Codling indicated her agreement with this comment (*via chat function due to technical issue*).

### **RESOLVED that:**

- Recommendations 2.1 (a), (b), (d) and (e) were approved as set out in the report.



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- Recommendation 2.1 (c) was not approved as set out in the report and an alternative proposal for there to be no transfer of funding between the Schools Block and HNB was approved.

### 6 Final De-delegations 2025/26 (Lisa Potts)

Lisa Potts introduced the report (Agenda Item 7), which set out the details, cost and charges to schools of the services on which maintained school representatives were required to vote (on an annual basis).

Lisa Potts reported that none of the services identified in the report for de-delegation had changed from previous years. A list of these services could be found under section 2.1 of the report along with a breakdown of the costs for each of the individual services for primaries and secondaries. The values in Appendix A were based on the previous year's census data from October 2023 and the actual calculations would be based on the October 2024 census data once available.

Lisa Potts reported that the consultation with schools had included a question asking if schools agreed that the services should be de-delegated. There were 15 responses, and all had agreed. For next year, all the services would be reviewed along with the implications if they were not de-delegated in 2026/27. This piece of work would be brought back to the Schools' Forum around springtime 2025.

*(The Chair directed the Schools' Forum back to item six to consider recommendation 2.1 (e))*

### 7 Draft HNB Budget Proposals 2025/26 (Nicola Ponton/Neil Goddard)

Nicola Ponton introduced the report (Agenda Item 8), which provided information on the proposed 2025-26 High Needs Block (HNB) budget.

Nicola Ponton drew attention to page 77 of the report, which provided a detailed summary of all the costs. Section 3.10 of the report outlined the budget required in the HNB for 2026/26 which equated to about £43m. The in-year overspend was predicted to be approximately £13m and the total cumulative overspend would be £30m. These were significant figures, and Hester Collicut would provide further detail on the Delivering Better Value Project (DBV) later on the agenda, which aimed to improve services for young people whilst looking to reduce the deficit in the HNB. The Chair noted that the numbers were enormous and that the deficit was increasing exponentially each year for multiple reasons. Edwin Towill commended the report and concurred with the Chair. He acknowledged the difficulty facing the LA and stated that he would be interested to see the longer term three to five year plan, which showed the deficit decreasing and a position reached where needs were being met with available funds.

**RESOLVED** that the Schools' Forum noted the report.

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

Hester Collicut introduced the report (Agenda Item 9), which intended to draw attention to the progress and the risks associated with the Delivering Better Value programme (DBV). The appendices provided the detail on the progress over the period April – October 2024.

Hester Collicut commented on the concerning figures detailed in the previous HNB report and reported that Delivering Better Value (DBV) was in place to manage part of these figures but was not a total solution. It was anticipated that the impact from DBV would be seen from September 2025 onwards. It would not solve all issues facing the HNB. Hester

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Collicut referred to page 99 of the previous HNB report which identified DBV mitigations and the percentage against the unmitigated deficit. The figures were as follows:

- 16.8 percent in 2025/26
- 16.47 percent in 2026/27
- 15.67 percent in 2027/28

This showed that the DBV would not solve the full ask against the HNB and this was the reflection across the national picture. Hester Collicut reported that 54 LAs were involved in the DBV and even with efforts associated with the DBV programme, LAs remained in deficit. The Department for Education (DfE) was fully aware of this. Five of the LAs had moved into the Safety Valve Programme, which was currently being reviewed by the DfE. The 54 LAs had been part of a trial and this work would now be rolled out nationally. Strategies had been formed as part of the trial that had impacted on HNB pressures and work undertaken in West Berkshire had been reflected nationally.

Hester Collicut reported that the Heads' Funding Group had requested to see the impact of the DBV programme in West Berkshire so far and this was set out in Appendix One to the report. Increased impact would be seen over the next six months, which would be reported to the Schools' Forum and the DfE through a quarterly report. The grant would be extended for some projects due to delayed start dates.

**RESOLVED** that the Schools' Forum noted the report.

### 9 Deficit Schools (Melanie Ellis)

Melanie Ellis introduced the report (Agenda Item 10), which in the first section provided details of the schools in deficit during 2024/25. The second section of the report provided information on lessons learned from monitoring schools in deficit.

Ten schools had ended 2023/24 in deficit and all but one of these now had a licensed deficit for 2024/25. The remaining school was going through the final approvals. An update would be provided on the in-year position at the next Forum meeting in January.

The main focus of the report was following a request to provide lessons learnt from deficit schools. The main reasons for schools being in deficit were set out in section five of the report. Reasons for why schools had not been able to recover deficits were set out in section six of the report followed by a good practice section covering those schools that had managed to put a good recovery in place and had either come out of deficit or were making good progress.

Trevor Keable noted that falling rolls was a reason for schools being in deficit and he highlighted that it was known nationally that rolls would be falling for the next two to three years. He queried if the LA had a plan in place on how to cope with this in terms of local schools. Neil Goddard reported that some detailed work was being undertaken on pupil place projections, which were informed by the static low birth rate and also building works/developments going on across the district. The aim was to take a long-term view of this matter in terms of the ongoing need for school provision, the financial viability of schools and the outcomes that were delivered for children and young people. This work would develop over the course of the coming year, moving towards a broader set of proposals. There was currently a report going through the political process looking at reducing the PAN at two West Berkshire Schools. Neil Goddard stated that the issue faced was recognised but it was important the process was not rushed and was conducted in an informed way.

Michelle Harrison felt that one area not identified as a reason for schools not being able to recover a deficit was the huge increase in special educational needs. Children often

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came to a school without funding and had to be supported with the same level of support staff.

**RESOLVED that** the Schools’ Forum noted the report.

**10 Forward Plans**

The Chair drew attention to the forward plans on page 119 and 121 of the agenda. The Schools’ Forum noted the forward plans.

Trevor Keable reported that he had submitted a question regarding the legal responsibilities of the LA. He had asked that a response be broken down for each of the legal responsibilities listed below by indicating staffing including vacancies and for an understanding to be provided on the financial budget of each area:

- 1) Identifying children not receiving a suitable education
- 2) Arranging suitable education for permanently excluded children
- 3) Supporting Fair Access Arrangements and
- 4) Supporting pupils with medical conditions

Trevor Keable requested that the response to his question be provided as a report to the next Forum meeting in January.

Neil Goddard reported that a response had been drafted. Melissa Perry would bring a report to the next Forum meeting on the specific items so that a discussion could take place.

**RESOLVED that** a response to Trevor Keable’s questions would be brought as a report to the next meeting in January 2025.

**11 Date and format of the next meeting**

The Schools’ Forum noted that the next meeting would take place virtually on Monday 20<sup>th</sup> January 2025. The subsequent meeting on 10<sup>th</sup> March would take place in person at Shaw House.

*(The meeting commenced at 5.00 pm and closed at 6.00 pm)*

**CHAIR** .....

**Date of Signature** .....

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**Actions from previous meetings**

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Update
Dec24-Ac1	19th December 2024	Forward Plans	A response to Trevor Keable’s questions to be brought as a report to the next meeting in January 2024.	Neil Goddard / Melissa Perry	A report including the response is included with the agenda for Schools' Forum meeting on 20th January.

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## Budget for Additional Funds 2025/26

**Report being considered by:** Schools' Forum on 20<sup>th</sup> January 2025

**Report Author:** Lisa Potts

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

### 1. Purpose of the Report

- 1.1 To set out the proposed 2025/26 budgets for the Growth Fund and Additional High Needs fund.
- 1.2 To note the updated Growth Funding Criteria 2025/26.

### 2. Recommendation

- 2.1 Agree that the 2025/26 Department for Education (DfE) allocation for growth is distributed to all schools via the school formula. The DfE have not issued an estimating tool this year and the growth allocations will be communicated to each local authority within their DSG settlement in December.
- 2.2 To set the Additional High Needs fund at £200k.

<b>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?</b>	
Yes: <input checked="" type="checkbox"/>	No: <input type="checkbox"/>

### 3. Implications and Impact Assessment

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

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

#### 4. Introduction

- 4.1 The main formula funding a school receives is retrospective and based on pupil numbers from the previous October census. Growth funding is allocated by the Department for Education (DfE) by formula and forms part of the Schools Block DSG allocation. It is allocated to meet the cost of increases in pre-16 pupil numbers either in new schools or bulge classes set up to meet basic need.
- 4.2 The formula for allocating growth funding to each local authority is based on the observed differences between the primary and secondary number on roll between the October 2023 and October 2024 school censuses. The growth is measured within each ‘middle layer super output area’ (MSOA). In West Berkshire there are 22 MSOAs. Changes in pupil numbers between the two censuses are identified for each MSOA, and any areas with a reduction in pupil numbers are discounted. Growth factor values are then applied:
  - (1) £1,570 for each primary growth pupil
  - (2) £2,350 for each secondary growth pupil
  - (3) £77,225 for each new school which opened in the previous year.
- 4.3 Funding is set aside annually from the high needs block to fund schools with a disproportionate number of high needs pupils that meet the agreed criteria.

#### 5. West Berkshire Growth Allocation Estimate 2025/26

- 5.1 In prior years the DfE have issued an annual growth calculator to generate illustrative growth allocations. However, this year this has not been made available. In 2024/25 growth funding was £502.5k.
- 5.2 Although there is a decrease in primary pupil numbers within the authority, there may be one or more of the MSOA’s that have an overall growth, thereby generating eligible primary growth. However, without the growth calculator it is difficult to estimate as to what value this may be.



5.3 There is actual growth in secondary school pupil numbers & thereby some funding will be generated for some of this growth.

## 6. Growth Fund

6.1 The Schools Forum must be consulted on the total size of the growth fund and criteria for use. The criteria formed part of the Schools Funding consultation and was supported.

6.2 As it is within the schools block, a movement of funding between the schools formula and the growth fund is not treated as a transfer between blocks. If funding is not required for growth, it can be added into the school formula, but if there is a shortfall, this needs to be met from a top slice of the main schools' block allocation.

6.3 The growth fund balance at 31.03.24 was £817k. Support for Highwood Copse as a new school has now finished, however, some of the allocated growth fund will need to be used annually to support Highwood Copse as a growing school. This is because the funding allocated by the DfE via the Authority Proforma Tool (APT) is based upon lagged pupil numbers and, as such, as an authority we will need to estimate and fund the increase in pupil numbers each year.

6.4 The table below shows the estimated draw on the growth fund up to 31.3.26. Based upon the unconfirmed pupil data, Trinity School may be eligible for growth funding in 2025/26. A contingency has been built in to cover two cases per year. This gives an estimated balance of £538k at 31.03.26 prior to adding any 2025/26 growth allocation.

	Growth	Balance
<b>Balance 31.03.24</b>		<b>-817,216</b>
<i>Trinity 2023/24</i>	43,875	-773,341
<i>Highwood Underwriting</i>	33,345	-739,996
<i>Trinity 2024/25</i>	54,833	-685,166
<b>Est Balance 31.03.25</b>		<b>-685,166</b>
<i>Contingency</i>	147,050	-538,116
<b>Est Balance 31.03.26</b>		<b>-538,116</b>

6.5 In 2024/25, it was agreed that the projected balance of the growth fund was sufficient and the 2024/25 allocation was added into the school formula and allocated to schools and not used to further increase the growth fund.

6.6 Based upon the projected growth fund balance at 31.03.26, it is proposed to once again add the DSG growth funding allocation for 2025/26 into the school formula and allocate to schools. Some of this allocation will be required to support the increase in pupil numbers at Highwood Copse (Sept 2025 - March 2026) via the APT. The remainder would be distributed to all schools.

6.7 A summary table is shown below:

## Budget for Additional Funds 2025/26

Growth Fund	Top up £	Spend £	Cumulative Balance £
2019/20	655,800	183,048	665,962
2020/21	904,945	69,836	1,501,071
2021/22	0	217,640	1,283,431
2022/23	0	286,696	996,735
2023/24	0	179,519	817,216
2024/25 <i>to date</i>	0	132,053	685,166
2025/26 <i>est</i>	0	147,050	538,116

## 7. Additional High Needs Funding

- 7.1 Funding needs to be set aside from the high needs block in order to fund those schools qualifying for additional high needs funding. It is proposed that be increased to £200k.

Additional High Needs Funding	Budget £	Spend £
2018/19	100,000	87,500
2019/20	100,000	183,048
2020/21	100,000	69,836
2021/22	40,000	217,640
2022/23	42,000	286,696
2023/24	65,000	179,519
2024/25	150,000	157,239
2025/26	200,000	

## 8. Proposals

- To distribute the 2025/26 growth funding DfE allocation to all schools via the school formula.
- To set the Additional High Needs fund at £200k.

## 9. Appendices

- 9.1 Appendix A – Criteria for Growth Fund 2025/26.

# Appendix A

## West Berkshire Council Schools Growth Fund Criteria 2025/26

### 1. Background

- 1.1 Growth funding allocated through the national funding formula (NFF) within each local authority's Schools Block.
- 1.2 The methodology to calculate growth funding was introduced in 2019/20 and has remained the same for the 2025/26 financial year. This means it will be based on the observed differences between the number on roll in each local authority between the October 2023 and October 2024 school censuses.
- 1.3 Growth is measured at middle layer super output area (MSOA) level to detect 'pockets' of growth, counting the increase in pupil numbers in each MSOA in West Berkshire between the two most recent October censuses.
- 1.4 The growth factor will be allocated at £1,570 per new primary pupil, £2,350 for each new secondary pupil plus a lump sum of £77,225 for each new school that opened in the previous year. The growth factor in the national funding formula is a proxy for overall growth costs at a local authority level. There is no expectation for local authorities to use these rates in their local arrangements for funding growth nor that spending on growth will match the sum allocated.
- 1.5 As growth funding is within the schools block, a movement of funding between the schools formula and the growth fund is not treated as a transfer between blocks. If funding is not required for growth, it can be added into the school formula, but if there is a shortfall, this needs to be met from a top slice of the main schools' block allocation. The amount of growth fund is subject to Schools Forum approval.
- 1.6 Local authorities must produce criteria for allocating growth funding, to be agreed by the Schools Forum. The criteria should contain clear objective trigger points for qualification and a clear formula for calculating allocations with these criteria applying to all schools on the same basis. This will be checked by ESFA for compliance with the annually made School and Early Years Finance (England) Regulations, to check that it provides a transparent and consistent basis for the allocation of funding, which may be different for each phase.
- 1.7 Any unspent growth funding remaining at the year-end should be reported to the Schools Forum. Funding may be carried forward to the following funding period, as with any other centrally retained budget, and can choose to use it specifically for growth if the authority wishes. Any over spent growth funding will form part of the overall DSG surplus or deficit balance.

### 2. Purpose

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

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

2.2 The growth fund may only be used to:

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

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

### 3. **Growth Fund Criteria**

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

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

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

#### Additional Class Funding Primary

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

- 3.4 Funding will be £77,000 (equivalent to 20 pupils x basic needs entitlement including ACA). The funding amount provided should be sufficient to cover the cost of a TMS6 teacher with on-costs, one TA, plus other costs.
- 3.5 Maintained primary schools will receive funding for the period September to March (7/12ths equivalent to £44,920)
- 3.6 The number of years this funding will be paid will depend on whether the growth is permanent or temporary. For example, an infant school that changes from a 2 form entry to a 3 form entry from September 2025 will typically receive growth funding in 2025/26, 2026/27 and 2027/28.

#### Secondary Schools Funding

- 3.7 This is payable where a school has *agreed with the authority to take an increased September in-take to meet basic need in the area.*
- 3.8 The staffing structure of secondary schools differs significantly to that of primary schools, the link between pupil numbers and the requirement for additional classes/teachers is less clear. It might be possible for schools to accommodate pupils within the existing curriculum model, without the need for an additional teacher.
- 3.9 Funding will only be provided for permanent growth and will be reviewed on a case-by-case basis. This is to ensure the increase in pupil numbers directly contributes to increased costs of admitting additional pupils e.g., curriculum structure, additional pastoral or support staff. The eligibility for funding will be assessed for each year of permanent growth.
- 3.10 Funding up to £114,000 will be available for academies. Applying the same formula as for primaries, this is based on 20 pupils x average basic needs entitlement including ACA.
- 3.11 Eligible maintained secondaries will receive funding up to £66,500 to cover the period from September to March.

#### KS1 Classes (infant class size)

- 3.12 This is payable to a school with infant classes which is required to set up an additional class as required by infant class size regulations, and the school cannot accommodate all its additional reception and Key Stage 1 pupils in classes of 30 or less i.e. the total number of pupils in the 3 year groups exceeds a multiple of 30. (see Appendix A for examples).
- 3.13 In order to qualify for the additional funding, the school must have set up an additional class and employed an additional teacher, and must not have exceeded its admission number unless requested to by the LA.
- 3.14 Funding will be £77,000 for each new class, pro rata for maintained schools for the remainder of the financial year. The funding provided should be sufficient to cover the cost of a TMS6 teacher with on-costs, one TA, plus other costs.
- 3.15 Before setting up an additional class and employing an additional teacher, schools should be aware that this additional in-year payment is temporary one-off funding for the remainder of the financial year in order to meet the pupil's basic need until full per pupil funding is received the following April (September for an academy). Schools will be required to meet the costs of the additional class from their formula

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

#### New School

- 3.16 **Start-up funding pre-opening** costs payable to a new school such as for the Headteacher and other staffing and recruitment costs prior to opening and initial equipping allowance where the school is opening in response to basic need in the area.
- 3.17 Funding will be actual cost of staff appointed and in post prior to the opening of the new school up to a maximum of £77,225
- 3.18 **Post opening funding - diseconomies of scale.** The total pupil numbers required by the new school to ensure viability will be agreed in advance with the school on an annual basis whilst the school is growing to full capacity and funding paid via the school formula will be based on this number. This will be reviewed on an annual basis and the estimates adjusted to take into account the actual pupil numbers in the previous funding period. Funding protection will be paid to the school based on the difference between the agreed pupil numbers and the actual pupil numbers for 3 full years.
4. **Applications for funding**
- 4.1 Schools will be invited to make an application for funding in the autumn term. Funding requests from schools are to be submitted to WBC Schools' Accountancy. In exceptional circumstances, a school may apply at a different point in the year.
- 4.2 The Service Director for Education, if satisfied that the criteria are met, will recommend approval to the Schools' Forum.
- 4.3 Funding for Sept – March will be paid following Schools' Forum approval. The other 5/12ths for academies is paid in April (to cover the period April to August).

## Examples of Infant Class Size Additional In-Year Funding

### Example 1

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

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

### Example 2

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

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

### **Example 3**

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

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

### **Example 4**

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

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



# Central Schools' Services Block Budget 2025/26

**Report being considered by:** Schools Forum

**Date of Meeting:** 20<sup>th</sup> January 2025

**Report Author:**

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

## 1. Purpose of the Report

1.1 To set out the budget proposal for services funded from the Central Schools' Services (CSSB) block of the DSG.

## 2. Recommendation

2.1 To agree to the Central Schools Services Block budgets.

2.2 As per the Heads Funding Group, a review to be undertaken on the value for money of services in the Central School Services Block.

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

<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		
<b>Data Impact:</b>		X		
<b>Consultation and Engagement:</b>	Lisa Potts, Neil Goddard, Melissa Perry			

#### 4. Introduction/Background

- 4.1 The CSSB covers funding allocated to Local Authorities (LAs) to carry out central functions on behalf of pupils in state-funded maintained schools and academies in England. All the services funded by this block are statutory and have to be carried out.
- 4.2 The final allocation of funding for the Central Schools Services Block for 2025/26 is £1,067,952, which is a £96k or 9% increase on the previous year.

#### 5. Supporting Information

- 5.1 The following table shows the budget requirement for the services that fall within the Central Schools Services Block for 2025/26 compared to 2024/25.

	Central Schools Services Block (CSSB)	2024/25 Budget	2025/26 Budget Requirement	Increase/Decrease	Change
		£	£	£	%
	<b>Budget Requirement:</b>				
1	School Admissions	211,586	239,336	27,750	13%
2	National Copyright Licences	179,859	184,097	4,238	2%
3	Servicing of Schools Forum	50,781	55,158	4,377	9%
4	Education Welfare	213,420	246,411	32,991	15%
5	Statutory & Regulatory Duties:				
a	Provision of Education Data	147,639	187,008	39,369	27%
b	Finance Support for the Education Service	82,494	88,005	5,511	7%
c	Strategic Planning of the Education Service	70,110	67,450	-2,660	-4%
	<b>Total Budget Requirement</b>	<b>955,889</b>	<b>1,067,464</b>	<b>111,575</b>	<b>11.7%</b>

- 5.2 For 2025/26, staff on council pay grades have been budgeted at 2.5% pay award, which is where the majority of the increased costs have come from. Other increases relate to the cost of the Capita system, with a new module being purchased to manage the fixed penalty notices.
- 5.3 The cost of copyright licence for schools is determined by the relevant national agencies. Details of all the other services included in the Central Schools Services Block (including a breakdown of costs) is given in Appendix A.

5.4 The table below shows the 2025/26 budget required, which will leave a small surplus of £16k to off-set against the prior year deficit.

Central Schools Services Block (CSSB)	2024/25 Budget	2025/26 Budget Requirement	Increase/Decrease	Change
	£	£	£	%
<b>Total Budget Requirement</b>	<b>955,889</b>	<b>1,067,464</b>	<b>111,575</b>	<b>11.7%</b>
<b>Funding:</b>				
Central Schools Services Block DSG	-961,311	-1,067,952	106,641	11.1%
Surplus to fund shortfall on prior year deficit	5,422	488		
<b>Total Funding</b>	<b>-955,889</b>	<b>-1,067,464</b>		
<b>Balance</b>	<b>-0</b>	<b>0</b>		

## 6. Heads Funding Group Recommendation

6.1 The Heads Funding Group have recommended that for 2026/27 a review is undertaken to establish the value for money.

## 7. Appendices

7.1 Appendix A – Details and Costs of Central Schools' Services

## Details and Costs of Central Schools' Services

	Number of Posts	% Charged to CSSB	2025/26 £
<b>School Admissions</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Administration of admissions process for maintained schools and academies			
<b><u>Staffing Structure</u></b>			
Admissions and Transport Manager	1.00	80%	
Admissions Officers	2.50	80%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			170,940
Employee Expenses & recharge of appeals costs			18,700
Supplies and Services			1,320
Capita One recharge			23,254
Support Service Recharges			25,122
<b>TOTAL ELIGIBLE EXPENDITURE FOR ADMISSIONS</b>			<b>239,336</b>
<b>Servicing the Schools Forum</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Setting agendas, minute taking, co-ordination and distribution of papers for Schools Forum and its sub groups			
<b><u>Staffing Structure</u></b>			
Service Director Education	1.00	10.00%	
Schools Finance Team	1.92	10.00%	
Schools Forum Clerk			
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			48,980
Room hire, consumables and members expenses			1,610
Support Service Recharges			4,568
<b>TOTAL ELIGIBLE EXPENDITURE FOR SERVICING THE SCHOOLS FORUM</b>			<b>55,158</b>

	Number of Posts	% Charged to CSSB	2025/26 £
<b>Education Welfare</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Tracking of children who can be legally removed from the school roll.			
Monitoring of elective home education.			
Issuing and monitoring of child work permits and performance licences.			
Attendance at core group meetings for specific pupils			
Advice on keeping registers			
Progress cases to court where appropriate. Maintain up to date knowledge of legal processes and proceedings so			
<b><u>Staffing Structure</u></b>			
Principal Education Welfare and Safeguarding Officer	1.00	40%	
Senior Education Welfare Officer	0.80	90%	
Education Welfare Officers	3.14	40%	
Assistant Education Welfare Officer	1.00	90%	
Administrative Assistant	0.40	90%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			203,171
Employee expenses/car allowances			4,900
Other non staffing costs			15,380
Income from fines			-19,350
Capita One Recharges			10,337
Support Service Recharges			31,973
<b>TOTAL ELIGIBLE EXPENDITURE FOR EDUCATION WELFARE</b>			<b>246,411</b>
<b>Provision of Education Data</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Statutory returns to DfE			
Data analysis and reporting e.g. Exam results, performance			
School census administration and reports			
<b><u>Staffing Structure</u></b>			
Staffing	2.00	75%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			91,710
Capita One recharge			81,595
Support Service Recharges			13,703
<b>TOTAL ELIGIBLE EXPENDITURE FOR PROVISION OF EDUCATION DATA</b>			<b>187,008</b>

	Number of Posts	% Charged to CSSB	2025/26 £
<b>Finance Support for the Education Service</b>			
<b><u>Description of Statutory Duties covered</u></b>			
DSG services budget preparation, monitoring, and year end			
Education services budget preparation, monitoring, and year end			
School funding formula and early years funding formula			
Administration of funding allocations to all schools for early years and high needs			
Statutory returns e.g. APT, S251, CFO deployment of DSG			
<b><u>Staffing Structure</u></b>			
Chief Mgt Accountant	1.00	5%	
Education Finance Manager	0.92	15%	
Education Senior Accountant	0.61	50%	
Education Accountant	0.50	65%	
Accountant	1.00	50%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			73,160
Support Service Recharges			14,845
<b>TOTAL ELIGIBLE EXPENDITURE FOR FINANCE SUPPORT</b>			<b>88,005</b>
<b>Strategic Planning of the Education Service</b>			
<b><u>Description of Statutory Duties covered</u></b>			
Strategic planning and management of the Education service as a whole			
<b><u>Staffing Structure</u></b>			
Service Director Education	1.00	40%	
Other staffing	1.00	27%	
<b><u>Breakdown of Costs</u></b>			
Staff salary costs			67,450
<b>TOTAL ELIGIBLE EXPENDITURE FOR PLANNING OF EDUCATION SERVICE</b>			<b>67,450</b>

## Dedicated Schools Grant 2025/26: Final Allocations

<b>Report being considered by:</b>	Schools' Forum		
<b>On:</b>	20 <sup>th</sup> January 2025		
<b>Report Author:</b>	Lisa Potts		
<b>Item for:</b>	Discussion	<b>By:</b>	All Forum Members

### 1. Purpose of the Report

- 1.1 To set out the final Dedicated Schools Grant (DSG) allocation for 2025/26.

### 2. Recommendation

- 2.1 To note the funding allocation.

### 3. Introduction

- 3.1 The National Funding Formula (NFF) is used by the Department for Education (DfE) to calculate the blocks within the Dedicated Schools Grant (DSG) and was finalised in December 2024.
- 3.2 The DSG consists of four blocks: Schools, High needs, Central School Services and Early Years.

### 4. Overall position

- 4.1 The following table shows the 2025/26 DSG final allocation based on the October 2024 census pupil numbers.

DSG Final Allocation	Schools Block (Including growth) £m	High Needs Block (before deductions) £m	Central Schools Services Block £m	Early Years Block £m	Total £m
<b>2025/26 total funding</b>	<b>143.57</b>	<b>30.83</b>	<b>1.07</b>	<b>27.70</b>	<b>203.16</b>
<i>2024/25 total funding</i>	<i>141.69</i>	<i>29.08</i>	<i>0.97</i>	<i>18.63</i>	<i>190.37</i>
<i>Change from last year</i>	<i>1.87</i>	<i>1.75</i>	<i>0.10</i>	<i>9.07</i>	<i>12.79</i>
<i>Percentage change</i>	<i>1.3%</i>	<i>6.0%</i>	<i>9.9%</i>	<i>48.7%</i>	<i>6.7%</i>
Deductions for NNDR and direct funding of High Needs places	-1.93	-1.44	0.00	0.00	-3.37
<b>2025/26 allocations after deductions</b>	<b>141.64</b>	<b>29.38</b>	<b>1.07</b>	<b>27.70</b>	<b>199.78</b>

### 5. Schools Block

- 5.1 2025/26 is the third year of the transition to the direct NFF for schools. In 2025/26, local authorities will only be allowed to use NFF factors in their local formulae. Local authorities will also be required to move their local formulae factors 10% closer to the NFF values, compared to where they were in 2024/25, unless they are already mirroring the NFF.

5.2 Funding through the mainstream schools NFF is increasing by 2.23% per pupil on average in 2025/26, compared to 2024/25. This includes a 1.28% increase to ensure that the 2024 teachers and support staff pay awards continue to be fully funded at national level in 2025/26. The final allocation for 2025/26 (based on October 2024 census data) is shown below:

Schools Block	2024/25 Total funding	2025/26 Final		
		Unit of funding	Number of pupils	Total funding
Primary	64,796,837	5,584.04	12,362	69,029,902
Secondary	66,686,955	6,929.72	10,438	72,332,417
Premises factor (NNDR)	2,032,396			1,896,510
2024/25 additional grants	7,675,682			-
<b>DfE allocation</b>	<b>141,191,870</b>			<b>143,258,830</b>
Growth	502,559			307,452
<b>Total block funding</b>	<b>141,694,429</b>			<b>143,566,283</b>
Block transfer ( 0.25% 24/25)	- 335,047			-
<b>Total formula funding</b>	<b>141,359,382</b>			<b>143,566,283</b>
NNDR direct allocation	- 376,239			- 1,929,400
<b>Total schools block after deductions</b>	<b>140,983,143</b>			<b>141,636,883</b>

## 6. High Needs Block (HNB)

- 6.1 The national increase in high needs funding from 2024/25 to 2025/26 is 9%.
- 6.2 The 2025/26 allocation for West Berkshire is £30.83m, before deductions for direct funding of places (2024/26 £29.08m), an increase of £1.44m from last year (6%).

## 7. Central Schools Services Block (CSSB)

- 7.1 The CSSB within the DSG provides funding for local authorities to carry out central functions on behalf of maintained schools and academies. This covers Statutory and Regulatory duties, Education Welfare, asset management and other duties such as licences, admissions and servicing of Schools' Forum.
- 7.2 The CSSB DSG funding for 2025/26 is £1.07m, an increase of 9.9% and £100k from last year.

## 8. Early Years Block

- 8.1 The new Early Years formula was introduced in 2017-18 with new funding rates to local authorities, and a revised simplified formula for allocating funding to providers was also brought in. All providers are now on the same rates.
- 8.2 Funding for 2025/26 is £27.7m. The increase in funding is due to new entitlements for working parents which will increase to 30 hours from September 2025 for children over 9 months old.



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## Schools Funding Formula 2025/26

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<b>Report being considered by:</b>	Schools' Forum		
<b>Date of Meeting:</b>	20 <sup>th</sup> January 2025		
<b>Report Author:</b>	Lisa Potts		
<b>Item for:</b>	Information	<b>By:</b>	All Forum Members And all Maintained Primary Members

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### 1. Purpose of the Report

- 1.1 To set out the final school funding formula allocations for 2025/26.

### 2. Recommendation

- 2.1 To note the final formula rates and allocations to schools, subject to political ratification and allocation to schools by 28<sup>th</sup> February 2025. The allocations have been made according to the principles agreed by Schools Forum in December and in relation to the total funding available from the Schools Block DSG allocation.

### 3. Introduction/Background

- 3.1 2025/26 is the third year of transition to the direct schools National Funding Formula (NFF). Each Local Authority (LA) will continue to have some discretion over their schools funding formulae, in consultation with local schools. The LA is responsible for making the final decisions on the formula.
- 3.2 Political ratification is required for the LA to be able to issue budgets to maintained schools. Allocations must be distributed to schools by 28<sup>th</sup> February 2025.
- 3.3 A consultation was held between 16<sup>th</sup> October 2024 and 6<sup>th</sup> November 2024. The responses were considered by the Schools Forum in December 2024, and the following agreed:
- (a) To mirror the Department for Education's (DfE) 2025/26 NFF to calculate the funding allocations.
  - (b) To address any surplus or shortfall in funding by adjusting the AWPU values.
  - (c) To use the full sparsity factor.
  - (d) To apply a 0% top slice to schools' funding.
  - (e) To approve the criteria to be used to allocate additional funds.
  - (f) To approve the proposed services to be de-delegated.

## Schools Funding Formula 2025/26

- 3.4 A decision will be made at the Schools Forum in January 2025 following the recommendation to add the DSG growth funding allocation for 2025/26 into the school formula and allocate to schools. This paper assumes that is agreed.
- 3.5 The DfE funding allocation for 2025/26 is £143.57m including growth funding (2024/25 £141.69m).

## 4. Appendices

- 4.1 Appendix A – Table showing final formula rates
- 4.2 Appendix B – Table showing final school funding allocations for 2025/26

Factor	National Rate	WBC National Rate (with ACA)	WBC Rate with full sparsity and 0.25% transfer	National Rate	WBC National Rate (with ACA)	WBC final rate (0% transfer & growth funding)	Total Funding with full sparsity, 0.25% transfer & growth funding	Total Funding after 0% transfer & growth funding		
	2024/25			2025/26			2024/25	2025/26		
<b>Basic per pupil funding</b>										
Primary AWPU	£3,562	£3,690	£3,671	£3,847	£3,986	£3,972	£46,388,016	£49,178,802		
KS3 AWPU	£5,022	£5,203	£5,176	£5,422	£5,618	£5,598	£32,836,687	£35,559,243		
KS4 AWPU	£5,661	£5,865	£5,834	£6,113	£6,334	£6,312	£23,898,605	£25,814,291		
<b>Minimum per pupil</b>										
Primary	£4,610	£4,610	£4,610	£4,955	£4,955	£4,955				
Secondary	£5,995	£5,995	£5,995	£6,465	£6,465	£6,465				
<b>Additional needs funding</b>										
<b>Deprivation</b>										
Primary FSM	£490	£508	£508	£495	£513	£513	£6,840,684	£8,046,636		
Secondary FSM	£490	£508	£508	£495	£513	£513				
Primary FSM6	£820	£850	£850	£1,060	£1,098	£1,098				
Secondary FSM6	£1,200	£1,243	£1,243	£1,555	£1,611	£1,611				
Primary IDACI A	£680	£705	£705	£685	£710	£710				
Primary IDACI B	£515	£534	£534	£520	£539	£539				
Primary IDACI C	£485	£502	£502	£490	£508	£508				
Primary IDACI D	£445	£461	£461	£445	£461	£461				
Primary IDACI E	£285	£295	£295	£285	£295	£295				
Primary IDACI F	£235	£243	£243	£235	£244	£244				
Secondary IDACI A	£945	£979	£979	£950	£984	£984				
Secondary IDACI B	£740	£767	£767	£745	£772	£772				
Secondary IDACI C	£690	£715	£715	£695	£720	£720				
Secondary IDACI D	£630	£653	£653	£635	£658	£658				
Secondary IDACI E	£450	£466	£466	£450	£466	£466				
Secondary IDACI F	£340	£352	£352	£340	£352	£352				
<b>Low Prior Attainment</b>										
Primary LPA	£1,170	£1,212	£1,212	£1,175	£1,218	£1,218			£4,621,470	£4,702,932
Secondary LPA	£1,775	£1,839	£1,839	£1,785	£1,850	£1,850	£4,317,947	£4,425,098		
<b>English as an Additional Language</b>										
Primary EAL	£590	£611	£611	£595	£617	£617	£636,996	£614,700		
Secondary EAL	£1,585	£1,642	£1,642	£1,595	£1,653	£1,653	£400,524	£403,010		
<b>Mobility</b>										
Primary Mobility	£960	£995	£995	£965	£1,000	£1,000	£77,755	£125,792		
Secondary Mobility	£1,380	£1,430	£1,430	£1,385	£1,435	£1,435	£0	£0		
<b>School led funding</b>										
<b>Lump Sum</b>										
Primary	£134,400	£139,246	£139,246	£145,100	£150,356	£150,356	£10,721,978	£11,577,375		
Secondary	£134,400	£139,246	£139,246	£145,100	£150,356	£150,356				
<b>Sparsity</b>										
Primary	£57,100	£59,159	£59,159	£57,400	£59,479	£59,479	£940,043	£954,610		
Secondary	£83,000	£85,993	£85,993	£83,400	£86,421	£86,421				
<b>Premises</b>										
Primary							£1,799,164	£1,929,400		
Secondary										
<b>Total Allocation (excluding minimum per pupil funding level and MFG funding total)</b>							<b>£133,479,868</b>	<b>£143,331,891</b>		
<b>Additional funding to meet the minimum funding level</b>							£178,812	£145,064		
<b>Total Allocation including minimum funding adi</b>							<b>£133,658,680</b>	<b>£143,476,954</b>		
<b>MFG adjustment</b>							£25,021	£89,329		
<b>Total funding for Schools Block Formula</b>							<b>£133,683,700</b>	<b>£143,566,283</b>		
<b>Amount of block transfer</b>							<b>£335,047</b>	<b>£0</b>		
<b>NNDR allocation</b>							<b>-£1,832,054</b>	<b>-£1,929,400</b>		
<b>DSG Schools Block DfE allocation</b>							<b>£132,186,693</b>	<b>£141,636,883</b>		

2025/26 School Formula Allocations

APPENDIX FINAL ALLOCATIONS 2025/26		2024/25 FINAL ALLOCATION (after 0.25% HNB transfer)			2025/26 FINAL ALLOCATION (after 0% HNB transfer)			YEAR ON YEAR CHANGE				
School Name	Phase	Pupil count Oct 2023	Formula allocated	Per pupil funding	Pupil count Oct 2024	Formula allocated	Per pupil funding	Change in pupils	Change in total cash	% change in cash	Change in per pupil total funding	% change per pupil
Beenham Primary School	Primary	58	£482,743	£8,323	45	£449,215	£9,983	-13	-£33,528	-7%	£1,659	17%
Chieveley Primary School	Primary	177	£899,008	£5,079	171	£944,021	£5,521	-6	£45,013	5%	£441	8%
Curridge Primary School	Primary	82	£509,414	£6,212	96	£632,452	£6,588	14	£123,038	19%	£376	6%
The Ilsleys Primary School	Primary	53	£414,979	£7,830	49	£431,422	£8,805	-4	£16,443	4%	£975	11%
Hermitage Primary School	Primary	188	£938,454	£4,992	172	£946,634	£5,504	-16	£8,180	1%	£512	9%
Hungerford Primary School	Primary	346	£1,772,871	£5,124	328	£1,842,728	£5,618	-18	£69,857	4%	£494	9%
Inkpen Primary School	Primary	48	£421,658	£8,785	37	£396,940	£10,728	-11	-£24,718	-6%	£1,944	18%
John Rankin Junior School	Primary	358	£1,679,949	£4,693	348	£1,780,008	£5,115	-10	£100,059	6%	£422	8%
John Rankin Infant and Nursery School	Primary	220	£1,128,644	£5,130	228	£1,286,743	£5,644	8	£158,100	12%	£513	9%
Birch Copse Primary School	Primary	414	£1,937,468	£4,680	417	£2,097,084	£5,029	3	£159,616	8%	£349	7%
Westwood Farm Junior School	Primary	238	£1,183,972	£4,975	239	£1,278,869	£5,351	1	£94,897	7%	£376	7%
Long Lane Primary School	Primary	209	£1,059,026	£5,067	207	£1,139,376	£5,504	-2	£80,349	7%	£437	8%
Garland Junior School	Primary	220	£1,163,795	£5,290	185	£1,080,262	£5,839	-35	-£83,533	-8%	£549	9%
Robert Sandilands Primary School and Nursery	Primary	213	£1,115,313	£5,236	211	£1,214,878	£5,758	-2	£99,564	8%	£522	9%
Westwood Farm Infant School	Primary	186	£952,740	£5,122	178	£1,001,718	£5,628	-8	£48,978	5%	£505	9%
Springfield Primary School	Primary	304	£1,463,122	£4,813	300	£1,547,978	£5,160	-4	£84,856	5%	£347	7%
Falkland Primary School	Primary	420	£1,964,104	£4,676	411	£2,066,262	£5,027	-9	£102,158	5%	£351	7%
Parsons Down Infant School	Primary	90	£548,861	£6,098	90	£590,443	£6,560	0	£41,582	7%	£462	7%
Mrs Bland's Infant School	Primary	148	£861,122	£5,818	126	£814,444	£6,464	-22	-£46,678	-6%	£645	10%
Downsway Primary School	Primary	212	£1,025,198	£4,836	212	£1,114,814	£5,259	0	£89,616	8%	£423	8%
Kennet Valley Primary School	Primary	194	£1,030,986	£5,314	199	£1,140,146	£5,729	5	£109,160	10%	£415	7%
Parsons Down Junior School	Primary	184	£976,161	£5,305	167	£983,144	£5,887	-17	£6,983	1%	£582	10%
Calcot Infant School and Nursery	Primary	191	£1,035,507	£5,422	170	£1,005,706	£5,916	-21	-£29,801	-3%	£494	8%
Calcot Junior School	Primary	273	£1,435,347	£5,258	261	£1,481,322	£5,676	-12	£45,974	3%	£418	7%
Spurcroft Primary School	Primary	382	£1,841,150	£4,820	368	£1,933,071	£5,253	-14	£91,921	5%	£433	8%
Pangbourne Primary School	Primary	164	£883,993	£5,390	136	£829,980	£6,103	-28	-£54,014	-7%	£713	12%
Aldermaston C.E. Primary School	Primary	103	£678,863	£6,591	116	£790,279	£6,813	13	£111,416	14%	£222	3%
Basildon C.E. Primary School	Primary	150	£764,729	£5,098	156	£851,865	£5,461	6	£87,136	10%	£362	7%
Beedon C.E. (Controlled) Primary School	Primary	35	£373,199	£10,663	22	£337,428	£15,338	-13	-£35,771	-11%	£4,675	30%
Brimpton C.E. Primary School	Primary	53	£443,554	£8,369	47	£442,179	£9,408	-6	-£1,375	0%	£1,039	11%
Bucklebury C.E. Primary School	Primary	107	£630,807	£5,895	113	£708,718	£6,272	6	£77,911	11%	£376	6%
Burghfield St Mary's C.E. Primary School	Primary	190	£962,434	£5,065	207	£1,135,759	£5,487	17	£173,325	15%	£421	8%
Chadwellworth St Andrew's C.E. Primary School	Primary	27	£328,324	£12,160	26	£342,718	£13,181	-1	£14,394	4%	£1,021	8%
Cold Ash St Mark's CE Primary School	Primary	195	£936,081	£4,800	203	£1,039,556	£5,121	8	£103,475	10%	£321	6%
Compton C.E. Primary School	Primary	179	£945,922	£5,284	166	£956,487	£5,762	-13	£10,564	1%	£477	8%
Emborne C.E. Primary School	Primary	75	£491,776	£6,557	81	£551,956	£6,814	6	£60,180	11%	£257	4%
Hampstead Norreys C.E. Primary School	Primary	67	£512,736	£7,653	49	£459,664	£9,381	-18	-£53,071	-12%	£1,728	18%
Kintbury St Mary's C.E. Primary School	Primary	130	£760,292	£5,848	122	£801,874	£6,573	-8	£41,583	5%	£724	11%
Purley CofE Primary School	Primary	93	£565,863	£6,085	81	£555,828	£6,862	-12	-£10,035	-2%	£778	11%
Shaw-cum-Donnington C.E. Primary School	Primary	95	£587,512	£6,184	91	£621,755	£6,832	-4	£34,243	6%	£648	9%
Shefford C.E. Primary School	Primary	52	£417,400	£8,027	52	£449,231	£8,639	0	£31,832	7%	£612	7%
Mortimer St Mary's C.E. Junior School	Primary	243	£1,145,899	£4,716	235	£1,192,140	£5,073	-8	£46,241	4%	£357	7%
Mortimer St John's C.E. Infant School	Primary	176	£885,448	£5,031	165	£900,616	£5,458	-11	£15,168	2%	£427	8%
Streatley C.E. Voluntary Controlled School	Primary	99	£562,495	£5,682	98	£599,770	£6,120	-1	£37,275	6%	£438	7%
Theale C.E. Primary School	Primary	314	£1,522,849	£4,850	308	£1,639,332	£5,323	-6	£116,483	7%	£473	9%
Welford and Wickham C.E. Primary School	Primary	66	£489,494	£7,417	62	£505,388	£8,151	-4	£15,894	3%	£735	9%
St Paul's Catholic Primary School	Primary	298	£1,416,337	£4,753	296	£1,518,929	£5,132	-2	£102,592	7%	£379	7%
Bradfield C.E. Primary School	Primary	148	£770,799	£5,208	150	£835,536	£5,570	2	£64,737	8%	£362	7%
Brightwalton C.E. Aided Primary School	Primary	93	£560,736	£6,029	87	£585,341	£6,728	-6	£24,605	4%	£699	10%
Englefield C.E. Primary School	Primary	109	£575,273	£5,278	110	£629,012	£5,718	1	£53,740	9%	£441	8%
St Nicolas C.E. Junior School	Primary	258	£1,235,423	£4,788	255	£1,353,766	£5,309	-3	£118,343	9%	£520	10%
Stockcross C.E. School	Primary	73	£499,252	£6,839	80	£562,388	£7,030	7	£63,136	11%	£191	3%
Sulhamstead and Ufton Nervet School	Primary	99	£584,194	£5,901	99	£637,414	£6,439	0	£53,221	8%	£538	8%
Woolhampton C.E. Primary School	Primary	100	£599,347	£5,993	102	£656,491	£6,436	2	£57,143	9%	£443	7%
Yattendon C.E. Primary School	Primary	94	£563,900	£5,999	90	£592,730	£6,586	-4	£28,830	5%	£587	9%
St Finian's Catholic Primary School	Primary	201	£960,876	£4,780	203	£1,049,659	£5,171	2	£88,782	8%	£390	8%
The Winchcombe School	Primary	425	£2,085,649	£4,907	414	£2,199,213	£5,312	-11	£113,564	5%	£405	8%
Thatcham Park CofE Primary	Primary	320	£1,581,182	£4,941	318	£1,702,463	£5,354	-2	£121,281	7%	£412	8%
The Willows Primary School	Primary	349	£1,895,491	£5,431	339	£2,003,738	£5,911	-10	£108,246	5%	£480	8%
St John the Evangelist C.E. Nursery and Infant Sch	Primary	179	£936,656	£5,233	171	£970,015	£5,673	-8	£33,359	3%	£440	8%
St Joseph's Catholic Primary School	Primary	213	£1,106,255	£5,194	213	£1,179,688	£5,538	0	£73,433	6%	£345	6%
The Willink School	Secondary	1016	£6,550,610	£6,447	1031	£7,183,271	£6,967	15	£632,661	9%	£520	7%
Little Heath School	Secondary	1312	£8,460,100	£6,448	1313	£9,119,619	£6,946	1	£659,519	7%	£497	7%
The Downs School	Secondary	1046	£6,404,391	£6,123	1045	£6,948,227	£6,649	-1	£543,836	8%	£526	8%
Fir Tree Primary School and Nursery	Primary	206	£1,149,166	£5,578	211	£1,264,759	£5,994	5	£115,592	9%	£416	7%
Whitelands Park Primary School	Primary	392	£1,920,240	£4,899	396	£2,102,015	£5,308	4	£181,774	9%	£410	8%
Highwood Copse Primary School	Primary	98.5	£574,925	£5,837	137.5	£792,004	£5,760	39	£217,080	27%	-£77	-1%
Lambourn CofE Primary School	Primary	149	£848,947	£5,698	136	£863,484	£6,349	-13	£14,536	2%	£652	10%
Speenhamland School	Primary	286	£1,462,786	£5,115	292	£1,647,268	£5,641	6	£184,482	11%	£527	9%
Francis Baily Primary School	Primary	524	£2,477,611	£4,728	531	£2,710,299	£5,104	7	£232,689	9%	£376	7%
John O'gaunt School	Secondary	463	£3,254,136	£7,028	448	£3,422,948	£7,641	-15	£168,813	5%	£612	8%
Theale Green School	Secondary	699	£4,658,693	£6,665	725	£5,234,392	£7,220	26	£575,698	11%	£555	8%
Park House School	Secondary	912	£5,857,925	£6,423	892	£6,157,384	£6,903	-20	£299,458	5%	£480	7%
Kennet School	Secondary	1522	£9,831,511	£6,460	1485	£10,370,359	£6,983	-37	£538,848	5%	£524	8%
Trinity School	Secondary	1145	£7,538,958	£6,584	1188	£8,489,226	£7,146	43	£950,268	11%	£562	8%
St Bartholomew's School	Secondary	1354	£8,395,759	£6,201	1352	£9,180,778	£6,791	-2	£785,019	9%	£590	9%
Denefield School	Secondary	971	£6,195,305	£6,380	963	£6,691,660	£6,949	-8	£496,355	7%	£568	8%
<b>Total formula funding</b>			<b>£133,683,700</b>			<b>£143,566,283</b>			<b>£9,882,583</b>			
<b>Block Transfer</b>			<b>£335,047</b>			<b>£0</b>			<b>-£335,047</b>			
<b>Additional grants</b>			<b>£7,675,682</b>						<b>-£7,675,682</b>			
<b>Total allocation</b>			<b>£141,694,429</b>			<b>£143,566,283</b>			<b>£1,871,854</b>			
<b>Primary Total</b>			<b>£66,536,312</b>			<b>£70,768,419</b>			<b>£4,232,107</b>			
<b>Secondary Total</b>		<b>23076</b>	<b>£67,147,388</b>		<b>22824</b>	<b>£72,797,864</b>		<b>-252</b>	<b>£5,650,475</b>			

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## Growth Fund 2024/25 Payments

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**Report being considered by:** Schools' Forum on 20<sup>th</sup> January 2025

**Report Author:** Lisa Potts

**Item for:** Information **By:** All School Representatives

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### 1. Purpose of the Report

1.1 To inform Heads Funding Group members of payments recommended to be made to schools from the Growth Fund budget in 2024/25.

### 2. Recommendation

2.1 To note the payment of £94k to Trinity School.

### 3. Introduction/Background

3.1 Growth funding is allocated by the Department for Education (DfE) by formula and forms part of the Schools Block DSG allocation. The funding can either be used to form a growth fund, or it can be added into the school formula. The Schools Forum must be consulted on the total size of the growth fund and criteria for use.

3.2 The purpose of the growth fund is to support maintained schools and academies which are required to provide extra places in order to meet basic need within the authority, and to meet the cost of new and reorganised schools including pre-opening and diseconomy costs. It can also fund schools where very limited pupil number growth requires an additional class as set out by infant class size regulations. It cannot be used for general growth in pupil numbers.

3.3 The growth fund is also to support new schools with pre-opening costs and diseconomies of scale.

3.4 Following the receipt of the final October 2024 Census data, all schools were invited to make a funding request if they felt that their circumstances met the growth fund criteria. To support their applications, schools were asked to submit information regarding increases in class and teacher numbers between the two academic years. Only growth in relation to basic need requirements in the area (and thus increases in PAN or bulge years approved by the local authority for this purpose) qualifies for this funding.

### 4. Applications Made 2024/25

4.1 The only school to apply for growth funding was Trinity school.

4.2 For the academic year 2024/25 Trinity have been required to accommodate a bulge year, with an increase of 41 students in year 7. This is to meet basic need in the area. The increase in pupil numbers at Trinity has impacted upon the curriculum

structure. In order to run extra core groups for this year group Trinity have employed two additional teachers, English and Maths.

## 5. Payments 2024/25

- 5.1 The Service Director for Education is satisfied that the relevant criteria have been met and therefore payment will be reported to the Schools Forum.
- 5.2 Trinity school advised that the required change to the curriculum structure has been costed as £93,997. Funding of up to £110,450 is available for secondary schools for each additional class. Academies' financial year runs from September to August, therefore, academies receive a full 12 months of growth funding. The payment of £94,000 will be paid to Trinity in two instalments, 7/12ths to cover the period Sept – March and the remaining 5/12ths to be paid in April. This additional 5/12ths element will be reimbursed by ESFA to the LA's Dedicated School's Grant 2026/27.
- 5.3 For 2024/25 and 2025/26 it has been agreed that the projected balance of the growth fund was sufficient and both allocations were to be added into the school formula. It has been agreed by Schools' Forum that any unspent balance on the growth fund will be carried forward.
- 5.4 The table below shows the forecast balance on the growth fund including the payment of £94k to Trinity included in the Contingency figures below.

	Growth	Balance
<b>Balance 31.03.24</b>		<b>-817,216</b>
<i>Trinity 2023/24</i>	<i>43,875</i>	<i>-773,341</i>
<i>Highwood Underwriting</i>	<i>33,345</i>	<i>-739,996</i>
<i>Trinity 2024/25</i>	<i>54,833</i>	<i>-685,166</i>
<b>Est Balance 31.03.25</b>		<b>-685,166</b>
<i>Contingency</i>	<i>147,050</i>	<i>-538,116</i>
<b>Est Balance 31.03.26</b>		<b>-538,116</b>

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## High Needs Block (HNB) Budget 2025/26

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**Report being considered by:** Schools' Forum on 20<sup>th</sup> January 2025

**Report Author:** Nicola Ponton & Neil Goddard

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

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### 1. Purpose of the Report

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

### 2. Recommendation

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:

- 0.4 post in the Early Development and Inclusion Team
- 1 FTE SEMH post
- £90,000 to maintain I-College placements

### 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 1668.

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:

<b>Financial year</b>	<b>HNB Allocation</b>	<b>Block transfer</b>	<b>Total HNB Deficit Budget set</b>	<b>Difference between budget set and HNB allocation</b>
<b>16/17</b>	-18,118,428	-858,000	21,584,180	2,607,752
<b>17/18</b>	-20,056,233	0	20,312,740	256,507
<b>18/19</b>	-19,958,537	27,000	20,041,180	109,643
<b>19/20</b>	-20,100,067	0	21,748,000	1,647,933
<b>20/21</b>	-21,691,304	-263,285	23,114,920	1,160,331
<b>21/22</b>	-23,631,318	-548,568	25,479,384	1,299,498
<b>22/23</b>	-26,282,076	-300,166	28,241,087	1,658,845
<b>23/24</b>	-28,495,697	0	31,587,958	3,092,261
<b>24/25</b>	-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 1668. 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 by September 2025 and to its full capacity of forty-two by 2027. 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 **£43,645,961**. The in year overspend is predicted to be **£12,922,767** and the total cumulative overspend will be **£29,014,460**. The High Needs Block grant value has not yet been finalised.

Cost Centre	Description	Proposed Budget 2025/26
90539	Special Schools Maintained	6,601,734
90548	Non WBC special schools	293,562
90554	Non WBC free schools	481,870
90617	Resource Units Maintained	696,400
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	124,976
90575	Non Maintained Special Schools	1,433,842
90579	Independent Special Schools	11,508,000
90580	Further Education	1,401,515
90627	Disproportionate HN Pupils	200,000
90556	New SEMH Provision at Theale	1,728,060
90557	Kennet Valley Resource Base	560,400
90625	PRU Top Up Funding	1,196,370

90628	PRU EHCP SEMH Placements	1,098,090
	<b>High Needs Block: Top Up Funding Total</b>	<b>31,905,037</b>
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	339,170
Top Slice	Resource Units Academies – pre 16	564,000
90551	Mainstream Maintained - post 16 SEN places	48,000
Top Slice	Mainstream Academies – post 16	60,000
Top Slice	Further Education	678,000
90320	Pupil Referral Units	860,000
	<b>High Needs Block: Place Funding Total</b>	<b>7,053,170</b>
90240	Applied Behaviour Analysis	392,080
90290	Sensory Impairment	251,220
90577	SEN Commissioned Provision	700,640
90565	Equipment for SEN Pupils	20,000
90295	Therapy Services	614,680
90288	Elective home Education Monitoring	61,640
90282	Medical Home Tuition	391,500
90610	Hospital Tuition	36,180
90281	SEND Strategy (DSG)	74,010
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	388,830
90830	ASD Advisory Service	314,280
90372	Therapeutic Thinking	74,480
90961	Vulnerable Children	179,400
90287	Early Development and Inclusion Team	107,900
90581	Dingley's Promise	125,000
90373	Emotionally Based School Avoidance (EBSA)(WBC Led)	142,460
90237	Emotionally Based School Avoidance (EBSA) (school led)	110,960
90237	Transition project - part funded DBV	46,310
90374	SEMH Practitioner	53,350
	Invest to save - i-college	90,000
	<b>High Needs Block: Non Top Up or Place Funding</b>	<b>4,512,680</b>
	SSR	175,072
	<b>High Needs Block Total</b>	<b>43,645,959</b>

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 **£4,118,587**
- Special School top ups - increased budget requirement of **£383,394**
- Mainstream EHCP top ups – increased budget requirement of **£275,650**
- Castle@Theale planned increase in numbers in 2024 – increased budget requirement of **£277,179**
- Kennet Valley SEMH resource planned increase in numbers for 2025 – increased budget requirement of **£140,590**
- PRU - increased budget requirement of - **£109,260**

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	339,170	0
Resource Units Academies – pre 16 (DSG top slice)	97	610,000	93	94	564,000	-3
Mainstream Maintained post 16	6	36,000	16	8	48,000	2
Mainstream Academies – post 16 (DSG top slice)	27	162,000	10	7	60,000	-20
Further Education	129	774,000	113	113	678,000	-16
PRU Place Funding (90320)	66	660,000	90	86	860,000	20
<b>TOTAL</b>	<b>725</b>	<b>6,458,520</b>	<b>769</b>	<b>778</b>	<b>7,053,170</b>	<b>53</b>

## 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 7)	Over/ (under) £	Estimate £	
Special Schools Maintained (90539)	6,218,340	5,965,800	-252,540	6,601,734	383,394
Non WBC special schools (90548)	215,290	352,727	137,437	293,562	78,272
Non WBC free schools (90554)	618,120	643,954	25,834	481,870	-136,250
Resource Units Maintained (90617)	676,122	676,120	-2	696,400	20,280
Resource Units Academies (90026)	1,259,558	1,218,850	-40,708	1,297,350	37,790
Resource Units Non WBC (90618)	105,638	60,430	-45,208	43,720	-61,920
Mainstream Maintained (90621)	1,821,000	1,937,071	116,071	2,039,520	218,520
Mainstream Academies (90622)	1,142,500	1,072,545	-69,955	1,199,630	57,130
Mainstream Non WBC (90624)	140,385	137,800	-2,585	124,976	-15,409
Non Maintained Special Schools (90575)	1,423,548	1,276,440	-147,108	1,433,842	10,294
Independent Special Schools (90579)	7,389,412	8,151,970	762,558	11,508,000	4,118,590
Further Education (90580)	1,465,000	1,276,790	-188,210	1,401,515	-63,485
Disproportionate HN Pupils (90627)	150,000	190,000	40,000	200,000	50,000
New SEMH Provision at Theale (90556)	1,450,881	1,450,880	-1	1,728,060	277,179
Kennet Valley Resource Base (90557)	419,810	419,810	0	560,400	140,590
<b>TOTAL</b>	<b>24,495,604</b>	<b>24,831,187</b>	<b>335,583</b>	<b>29,610,579</b>	<b>5,114,969</b>

## 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 Autumn 2025.

## 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 a slight decrease in costs in further education this is due to slightly reduced numbers of students attending local college.

## 2.9 Castle@Theale Secondary SEMH Provision

Castle@Theale 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 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

## 3 PUPIL REFERRAL UNITS (PRU) – STATUTORY asked for 31/10/2024

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

TABLE 3 PRU Budgets	2024/25 Budget			2025/26	
	Budget £	Forecast £ (Month 7)	Over/ (under) £	Estimate £	Difference 24/25 budget & 25/26 prediction
PRU Top Up Funding (90625)	1,139,400	1,139,400	0	1,196,370	56,970
PRU EHCP SEMH Placements (90628)	1,045,800	1,045,800	0	1,098,090	52,290
Non WBC PRU Top Up Funding (90626)	0	0	0		0
<b>TOTAL</b>	<b>2,185,200</b>	<b>2,185,200</b>	<b>0</b>	<b>2,294,460</b>	<b>109,260</b>

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 The estimate forecast is based on this year's current project plus 3%.

3.11 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.

3.12 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 7)	Over/ (under) £	Estimate £	Difference 24/25 budget & 25/26 prediction
Applied Behaviour Analysis (90240)	270,420	380,660	110,240	392,080	121,660
Sensory Impairment (90290)	296,460	253,380	-43,080	251,220	-45,240
SEN Commissioned Provision (90577)	650,830	680,040	29,210	700,640	49,810
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	41,800	-7,680	61,640	12,160
Medical Home Tuition (90282)	381,690	329,800	-51,890	391,500	9,810
Hospital Tuition (90610)	36,180	18,090	-18,090	36,180	0
SEND Strategy (DSG) (90281)	69,230	69,230	0	74,010	4,780
Alternative Provision Co-ordinator	39,540	39,540	0	42,640	3,100
<b>TOTAL</b>	<b>2,334,910</b>	<b>2,362,450</b>	<b>27,540</b>	<b>2,584,590</b>	<b>249,680</b>



#### 4.1 **Applied Behaviour Analysis (ABA) / Personal Budgets**

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 (which will be renamed) supports 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 needs to increase due to increasing numbers of children with SEN Personal Budgets. However, 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. This budget will be split over two separate cost centres.

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 7)	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	342,500	-21,330	388,830	25,000
ASD Advisory Service (90830)	248,800	248,800	0	261,590	12,790
ASD Fund - Additional support	52,690	52,690	0	52,690	0
Therapeutic Thinking (90372)	69,330	58,130	-11,200	74,480	5,150
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	68,950	0	75,920	6,970
Dingley's Promise (90581)	35,000	120,000	85,000	125,000	90,000
Emotionally Based School Avoidance (EBSA)(90373)	139,240	139,240	0	142,460	3,220
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	4,440	-23,750	31,980	3,790
SEMH Practitioner	43,560	43,560	0	53,350	9,790
Extension of i-college	90,000	90,000	0	90,000	0
<b>TOTAL</b>	<b>1,712,996</b>	<b>1,681,710</b>	<b>-31,286</b>	<b>1,928,090</b>	<b>215,094</b>

#### **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 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 to 1.8 FTE. However, following additional resources (0.90 FTE) which is being funded by DBV, EDIT have been able 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

An additional 0.4 post was agreed as an invest to save initiative in 2022-23 and carried forward to 2023-24. This was requested for 2024-25 but was replaced by the DBV funding detailed above. Ideally, a minimum of 0.4 days can be agreed as permanent extra hours to ensure EDIT can avoid having a waiting list. A permanent extension to EDIT hours of 0.9 FTE would mean a continuation of all the provision listed in 5.2.1 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.
  - The DBV Programme and its governance has become fully aligned and incorporated into the new [SEND and Inclusion Strategy 2024 to 2029](#) to ensure the overarching delivery of the “Innovation in SEND” programme in West Berkshire.
2. The activities of the DBV workstreams are incorporated within the six priorities and enablers identified in the SEND and Inclusion Strategy, to be delivered between 2024 -2029.

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



	<p>leaders can respond to the views of children &amp; young people and their families.</p> <ul style="list-style-type: none"> <li>• Enhance the work to support the SEND Youth Forum, ensuring that leaders can respond to the views of children and young people.</li> <li>• Ensure the most efficient use of limited financial resources in the High Needs Block of funding.</li> </ul>
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<p><b>DBV Workstream 1 – Objective:</b> Clear communications with families and wider local area partners to support access to services and the SEND system when they need it.</p> <p><b>Approach listed below:</b></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"> <li>• 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. “A plan on a page” for available services will be published on the Local Offer.</li> <li>• Gaps in offers are being identified and will be commissioned or co-commissioned as necessary and the Local Offer updated.</li> </ul>
<p>GAP analysis</p>	
<p>Ensuring clear and current referral pathways are published for families &amp; service users. Update and refresh the Local Offer to ensure accessibility for service users</p>	
<p>Communications Plan to relaunch updates to Local Offer to families and service users</p>	<ul style="list-style-type: none"> <li>• 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.”</li> <li>• An ‘Innovation in SEND’ blog / web page published to showcase updates</li> <li>• Parent Champion Coram Programme promoting engagement with families</li> <li>• A parent /carer survey of the Local Offer to inform a “refresh” of the Local Offer – “ You said/we did document” _ Nov 2024 Local Offer</li> </ul>
<p>Creating a digital dashboard to measure performance and inclusivity.</p>	<ul style="list-style-type: none"> <li>• A public facing dashboard is being developed for the Local Offer (Dec 2024)</li> </ul>

<p><b>DBV Workstream 2 - Objective:</b> 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><b>Approach listed below:</b></p>	<p>What has been delivered in West Berkshire since April 2024</p>
<ul style="list-style-type: none"> <li>• Whole School Mental Health Project</li> </ul>	<ul style="list-style-type: none"> <li>• A revised, evidenced based pilot Mental Health Project programme is underway led by the Virtual School Team who are working with ten schools. (October 2024- July 2025).</li> <li>• All mainstream schools will have access to an online learning platform to support Mental Health identification and good practice.</li> </ul>
<ul style="list-style-type: none"> <li>• Focus on supporting transitions into mainstream (Transitions Support Programme) to be led by schools and co-produced in clusters.</li> </ul>	<ul style="list-style-type: none"> <li>• Transitions Support Programme Pilot-Pupil level data has been reviewed to enable the identification of mainstream Year 6 pupils most likely to require additional support at transition. Targeted interventions will be available for these children to ensure as many as possible successfully transition into their secondary mainstream school – January 2025 -January 2026 – 50/50 funding DBV &amp; Schools.</li> <li>• West Berkshire Schools’ Guidance for a Successful Primary to Secondary Transition and Early Years to Reception will be published in October 2024.</li> </ul>
<ul style="list-style-type: none"> <li>• 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.</li> <li>• Delivering a pilot of updated banding system and impact analysis if review supports this.</li> <li>• 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</li> </ul>	<ul style="list-style-type: none"> <li>• Phase 1 of a SEND funding review completed August 2024. Phase 2 underway, co-produced with schools. This will provide ;- <ul style="list-style-type: none"> <li>➤ A shared understanding of the range and levels of needs across West Berkshire settings and schools and how that compares with other areas.</li> <li>➤ A clear and consistent graduated approach to meeting needs across the local area.</li> <li>➤ A transparent and equitable system of SEND funding and resource allocation across West Berkshire.</li> <li>➤ Identification and development of changes to the current SEND system.</li> <li>➤ Improvement in the quality and clarity of EHCPs.</li> <li>➤ Evidencing the impact of resourcing on children and young people’s outcomes.</li> </ul> </li> </ul>

<p><b>DBV Workstream 2 - Objective:</b> 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><b>Approach listed below: (contd.)</b></p>	<p>What has been delivered in West Berkshire since April 2024</p>
<ul style="list-style-type: none"> <li>• Reviewing decision making processes to ensure transparency, consistency, and value for money. Decision making processes to be updated, where necessary, on the local offer.</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>
<ul style="list-style-type: none"> <li>• Provide additional capacity to pilot Annual Reviews for Year 5/6s to support Transitions Programme</li> </ul>	<ul style="list-style-type: none"> <li>• New quality assurance process for EHC plans and Annual review (Nov 2024 – Nov 2026) -Funded by WBC</li> <li>• Revision of Standard Operating procedures (SOPS) and Induction training for SEND Casework Team in data input under review</li> <li>• Additional resourcing to process transition Annual Reviews quickly to support Transitions Support Programme in place.</li> </ul>
<ul style="list-style-type: none"> <li>• Audit schools' additional SEND training needs through surveys, focus groups and case studies to create a plan to meet gaps in existing SEND training.</li> </ul>	<ul style="list-style-type: none"> <li>• An audit of schools' training needs has been undertaken and an evaluation of impact of current LA support services is being completed</li> </ul>
<ul style="list-style-type: none"> <li>• 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.</li> <li>• Multi-disciplinary teams to support schools (Transitions Support Programme) e.g.</li> <li>• Increase the Early Development and Inclusion Team (EDIT) capacity.</li> <li>• Increase the Autism Team capacity.</li> </ul>	<ul style="list-style-type: none"> <li>• Pilot Early Years Transitions Support Programme delivered from Summer Term 2024 supported Early Years transition into Foundation 2 – EYSENIT team</li> <li>• The Key Stage 2/3 Transitions Programme has been co-produced with schools (Primary and Secondary SENCOs and Year 7 teachers)</li> <li>• Additional ASD and SEMH support posts for transitions support pilot for year 5/6 pupils.</li> </ul>
<p><b>DBV Workstream 2 - Objective:</b> 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>What has been delivered in West Berkshire since April 2024</p>

Approach listed below: (contd.)	
<ul style="list-style-type: none"> <li>• Ensuring and supporting data analysis to inform development of sufficiency strategy.</li> <li>• <i>Enabler in SEND and Inclusion Strategy: - To develop a digital strategy which enables us to collect, use &amp; share data more effectively; and to develop a digital dashboard enabling leaders' effective oversight</i></li> </ul>	<ul style="list-style-type: none"> <li>• Work on SEND Data Management has informed the development of a Sufficiency Plan, data dashboards and a clearer financial overview.</li> <li>• West Berkshire <b>SEND Placement Sufficiency Analysis- 30 August 2024</b> is being ratified and will be published November 2024.</li> <li>• Paper to Corporate Board to be presented on Mitigation of Specialist Placements – 26/11/2024 with detailed proposals to develop SEND placement capacity and enhance the continuum of provision in West Berkshire.</li> </ul>
<ul style="list-style-type: none"> <li>• Reviewing and updating of Strategic and Operational commissioning and procurement practices - include brokerage and contract management.</li> <li>• Stimulating markets, where necessary, to ensure appropriate and sufficient placement types are available for specialist and Alternative provision to meet current and anticipated demand.</li> </ul>	<ul style="list-style-type: none"> <li>• 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).</li> </ul>
<ul style="list-style-type: none"> <li>• Reviewing individual high-cost placement packages to ensure they meet need and remain value for money.</li> <li>• Reviewing of funding arrangements on all placements - joint children's services piece of work across social care and education - led by strategic commissioner.</li> <li>• Piloting multi agency funding system for high-cost placements and reviewing all Joint funding/commissioning arrangements with social care and health.</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>

### 3. Funding Review

As part of the work of DBV 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	£15,766,217	£20,863,699

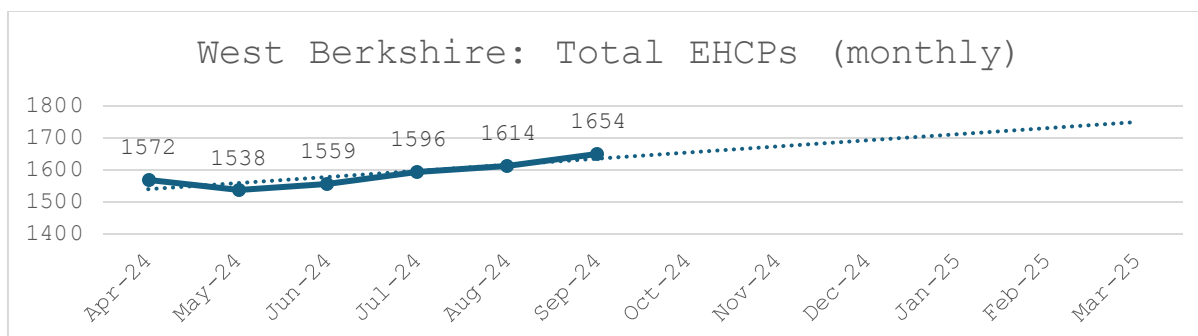
4.2 The mitigated cost avoidance has been achieved by: -

- 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, West Berkshire is currently maintaining approximately 1670 EHC plans (Oct 2024), and it is anticipated that this figure will continue to grow, even with the mitigations in place provided by the DBV Programme. These figures are in line with the trend we have seen throughout the financial year, with numbers expected to reach 1700 by December 2024. 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 forecast of the High Need Block.

	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	7,053,170
Top Up Funding	24,495,610	24,901,150	29,610,579
PRU Funding (top ups only)	2,185,200	2,185,200	2,294,460
Other Statutory Services	2,334,910	2,362,450	2,584,590
Non Statutory Services	1,712,996	1,681,710	1,928,090
Support Service Recharges	213,480	173,697	175,072
<b>Total Expenditure</b>	<b>37,400,716</b>	<b>37,762,727</b>	<b>43,645,961</b>

HNB DSG Allocation	-29,153,266	-29,153,266	-30,723,194
0.25% Schools Block Transfer	-335,047	-335,047	0
Clawback from schools	0	-1,518,292	0
In year overspend	7,912,403	6,756,122	12,922,767
HNB DSG Overspend from previous year	9,864,006	9,335,571	16,091,693
<b>Total cumulative deficit</b>	<b>17,776,409</b>	<b>16,091,693</b>	<b>29,014,460</b>



## Appendix C

### Historical Data

<b>TABLE A</b>			
<b>Top Up Funding</b>	<b>2021/22 £</b>	<b>2022/23 £</b>	<b>2023/24 £</b>
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
<b>TOTAL</b>	<b>14,279,289</b>	<b>16,288,789</b>	<b>20,550,468</b>

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

<b>TABLE C</b>			
<b>Other Statutory Services</b>	<b>2021/22 £</b>	<b>2022/23 £</b>	<b>2023/24 £</b>
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
<b>TOTAL</b>	<b>1,621,570</b>	<b>1,784,747</b>	<b>2,056,821</b>

<b>Table D Non Statutory Services</b>	<b>2021/22 £</b>	<b>2022/23 £</b>	<b>2023/24 £</b>
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
<b>TOTAL</b>	<b>1,238,772</b>	<b>1,489,061</b>	<b>1,419,707</b>

<b>TABLE E</b>	<b>2021/22</b>			<b>2022/23</b>			<b>2023/24</b>		
<b>Place Funding</b>	<b>pupil numbers</b>	<b>planned places</b>	<b>£</b>	<b>pupil numbers</b>	<b>planned places</b>	<b>£</b>	<b>pupil numbers</b>	<b>planned places</b>	<b>£</b>
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
<b>TOTAL</b>			<b>4,882,046</b>			<b>4,872,690</b>			<b>4,908,864</b>

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## Early Years Rates to providers 2025/26

**Report being considered by:** Schools' Forum  
**Date of Meeting:** 20<sup>th</sup> January 2025  
**Report Author:** Lisa Potts  
**Item for:** Information **By:** All Forum Members

### 1. Purpose of the Report

1.1 To set out the proposed funding rates for Early Years providers

### 2. Recommendation

2.1 To agree the hourly rates for Early Years entitlement for 2025/26.

### 3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?				
<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?				
<b>Data Impact:</b>				
<b>Consultation and Engagement:</b>	Early Years Funding Group			

#### 4. The funding rate Framework for 2025/26

4.1 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 have been able to access 15 hours per week
- From September 2024, all working parents of children ages 9 months up to 3 years have been able to access 15 hours per week.
- From September 2025, all working parents of children aged 9 months to 3 years old will be able to access 30 hours free childcare per week.

4.2 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

#### 5. Funding Rates for providers 2025/26

5.1 The DFE have asked that we publish our rates to providers by 28<sup>th</sup> February 2025.

5.2 We have used the rates above to determine a local hourly rate for the following provision types:

	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	-

5.3 The Disability Access Fund levels are determined by the DFE.

5.4 The Early Years Pupil Premium is made up of £1.00 grant plus a 72p deprivation supplement for all funding streams.

5.5 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 all funding streams which is at least 96% of the authority’s funding rate.

## 6. Conclusion

- 8.1 The rates for Early Years providers have been set at a level that fits within the DFE guidelines of 96% pass-through rate

## 7. Appendices

- 7.1 None

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## Response to Trevor Keable

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**Report being considered by:** Schools' Forum on 20<sup>th</sup> January 2025  
**Report Author:** Melissa Perry  
**Item for:** Information      **By:** All School Representatives

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### 1. Purpose of the Report

1.1 In response to an email received by Trevor Keable (set out on section 3.1 below) to Chair of the Schools' Forum and Neil Goddard.

### 2. Recommendation

1.1 That the information be noted.

### 3. Introduction/Background

3.1 I note from the Constitution of West Berkshire Schools' Forum, Section C, para 3.2: "Items for consideration by the Forum shall be submitted to the Clerk no later than ten working days prior to the meeting."

Local authorities have a Legal responsibility on the following:

- 1) Identifying Children not receiving a suitable education
- 2) Arranging suitable education for permanently excluded children
- 3) Supporting Fair Access Arrangements and
- 4) Supporting Pupils with medical conditions (including Mental Health). This includes: promote and protect public physical and mental health, safeguarding children and young people and assessing and supporting children with SEND.

Please can we have a breakdown of staff (including vacancies) to cover these areas and financial budget with estimated overspend / underspend.

I believe the Forum needs to understand these figures in light of the changes and present vacancies with the EWO service, the blockages within iCollege (educating Children not suitable for main stream education rather than children who can have planned returns to Education) and the practical lack of support experienced by schools in supporting children with medical conditions.

I recognise we have had much of this information in reports but have never had the opportunity to understand if the funding is working and whether the LA is legally covering it's legal responsibilities.

## 4. Supporting Information

4.1 I will try and address every aspect of the questions above to ensure transparency:

4.2 1. Identifying Children Not Receiving a Suitable Education

### 4.3 Overview

- Ensuring that all children receive a suitable education is a legal and moral obligation. A "suitable education" is one that enables children to achieve their potential and prepares them for adult life. Challenges such as truancy, school refusal, increased suspensions/exclusions, poor attendance, health, socio-economic factors, and unsuitable home education contribute to this issue.
- Over the past 18 months the Education Attendance/Welfare Service has made significant improvements to this duty including the recruitment of a dedicated CME/FAP Officer to ensure that the robust processes are in place to identify, track and support CME pupils back into a swift education.
- Our EHE offer to the community is well received and we have built up good relationships. Gold Award for this was issued by Education Otherwise to the officer. We are also strengthening this provision by increasing capacity to full-time.
- We have strengthened scrutiny and processes in relation to EHE and are using parental responsibility measures where appropriate which has supported some pupils return into a suitable school setting.
- There continues to be a rise in parents opting to EHE and this needs to be addressed across all schools to review the reasons at play.
- Through Targeted Support Meetings with all schools, the Education Attendance/Welfare Team is working collaboratively with schools on strategic plans to ensure 'support first' approach.

4.4 Key Actions

### 4.5 Develop a Robust Tracking System:

- Implementation of a centralised data system to monitor school attendance and identify at-risk children.
- Improvements will be to enhance cross-referencing with health to ensure comprehensive coverage.
- The Children's Well-being Bill will support LAs track and know pupils receiving education other than at school. We are supporting the progression of this through active talks with our networking partners and DfE.

### 4.6 Engage with multi-Agency Teams:

- Collaborate with social workers, health professionals, and law enforcement to identify children missing from education (CME). Training sessions have been

accessed across internal services and outreach to the health service includes attendance at the safeguarding meeting for GPs proposed in January. Policy includes information on referral process for external agencies and 'anyone' and online form activated. Targeted training sessions for schools available.

- Creation of a collaborative LA wide attendance strategy to stay compliant with WTTISA.
- Planned work for Jan 25 with health colleagues to address training and improvements

#### 4.7 **Conduct Community Outreach:**

Proposed hosting of forums and distribute resources in communities with high absenteeism rates. Encourage parents to engage with education services and report barriers.

#### 4.8 **Provide Training for Educators:**

- Train school staff to recognise early signs of disengagement or family challenges and escalate concerns to the relevant authorities – webinars have been in place this term
- Comprehensive training offer to all schools to support WTTISA.

#### 4.9 **Enhance Reporting Channels:**

Ensure anonymous and accessible reporting methods for community members to alert authorities about CME concerns now in place through online accessible forms. Website information to be developed by T-level student placements in Jan 2025.

Additional progress:

#### 4.10 **15 days absence notification**

- Reports of 15 days absence, consecutive or cumulative are analysed, tracked and investigated to ensure no drift and delay. Improvement on returns from schools and process being reviewed considering high numbers to analyse effectively and decide on appropriate education provision.
- Improvement required on information received to enable effective decision making.

#### 4.11 **2. Arranging Suitable Education for Permanently Excluded Children**

##### 4.12 **Overview**

Permanently excluded students often face educational and social disadvantages, risking marginalisation. Promptly arranging suitable educational provisions mitigates this risk.

##### 4.13 **Actions Being Taken to Address Rising Suspensions and Exclusions:**

- (1) **Proactive Monitoring and Support for Pupils at Risk:**  
Regular *Pupil at Risk* meetings are conducted to identify and address the needs of pupils vulnerable to permanent exclusions (PEX), ensuring early intervention strategies are in place, however potential reduction in funding will impact the provision of this service.
- (2) **Delivering Better Value (DBV) Project and SEND and Inclusion Strategy 2024-2029:** (see attached one page plan: Appendix 2)  
The DBV project is aligned with the SEND and Inclusion Strategy, focusing on six key priorities, including inclusion. Key initiatives under this project include:
- (3) **SEND Funding Stream:** Enhanced financial support targeted at improving SEND services.
- (4) **Targeted Transition Support:** Identifying vulnerable pupils during primary to secondary school transitions (Years 6 to 7) and implementing a structured transition program.
- (5) **Specialist Recruitment:** Recruiting two ASD workers and an SEMH worker to provide dedicated support for pupils and schools during transitions.
- (6) **Building Confidence in Mainstream Schools to Support SEN Pupils:**
  - Developing the *Ordinarily Available* framework to clarify referral pathways into support services, including health, and providing resources for schools and parents.
  - Strengthening Special Educational Needs (SEN) support within schools.
  - Expanding Alternative Provision (AP) to better meet the needs of at-risk pupils.
  - Conducting multi-agency discussions and solution-focused meetings with schools to address individual cases and system-level challenges.
- (7) **Improving Strategic Planning and Resources:**
  - Establishing a commissioning function within education to better define needs and service delivery.
  - Creating a Service Level Agreement (SLA) with the PRU to formalize expectations and enhance service offerings.
- (8) **Innovative Mental Health Pilot Project (AATIMHP):**
  - Funded by the DBV grant, this pilot project aims to develop inclusive school cultures and effective behaviour management strategies.

- Participating schools will receive tailored support from Flourish (formerly AC Education), Consultant Tony Clifford, and Birmingham Newman University. The program also includes educational psychology and mentoring support.
- Results from other local authorities show reductions in suspensions and exclusions, and similar outcomes are expected in West Berkshire.

**(9) Behaviour Management Training and Policy Review:**

- Schools are being offered online training in behaviour management.
- Policies and procedures within schools are under review to ensure consistency and effectiveness in managing behaviour and supporting pupils at risk of exclusion

#### 4.14 3. Supporting Fair Access Arrangements

##### 4.15 Overview

- Fair Access Protocols (FAP) aim to secure school placements for vulnerable children, including those excluded or new to an area. This process ensures equity in school admissions.
- Delays in leadership and internal processes have impacted the joint protocol being released for consultation with schools. This will happen imminently. There is a budgetary requirement within this.

##### 4.16 Key Actions

- (1) **Streamline Admissions Processes:**  
Establish clear timelines for placing students under FAP to avoid prolonged delays.
- (2) **Promote Transparency and Accountability:**  
Publish annual FAP reports detailing placements and outcomes to build trust and accountability.
- (3) **Encourage School Cooperation:**  
Foster partnerships with schools to distribute responsibility fairly and support schools in accommodating vulnerable students.
- (4) **Provide Financial and Professional Support:**  
Offer resources, including funding and specialist staff, to schools accepting children under FAP.
- (5) **Engage Families in Decision-Making:**  
Involve parents and guardians in placement decisions, ensuring their concerns are addressed.

#### 4.17 Supporting Pupils with Medical Conditions (Including Mental Health)

#### 4.18 **Overview**

Students with physical and mental health conditions require tailored support to achieve their educational potential. Effective systems and collaboration between health and education sectors are vital.

- (1) Promoting and Protecting Physical and Mental Health
- (2) **Develop Health Support Plans:**  
Work with healthcare and school professionals to create individualised health care plans for students, specifying medical needs, medication administration, and emergency procedures including how the pupil can access education despite the medical needs.
- (3) Collaborative approach
- (4) EBSA SEND strategy commenced to support the rising issues of school avoidance
- (5) Work with schools to identify the gaps in support and approach to medical pupils
- (6) **Enhance Mental Health Support:**  
Further embed school-based mental health practitioners and offer regular training for teachers to recognise mental health issues and early intervention. Mental Health project piloting in 10 schools in WB has commenced
- (7) **Provide Flexible Learning Options:**  
Use technology and part-time schedules to support students unable to attend school full-time with clear guidance

#### 4.19 4. Safeguarding Children and Young People

- (1) **Implement Safeguarding Policies:**  
Regularly update policies to reflect current best practices and train staff on safeguarding responsibilities.
- (2) **'Eyes on' processes:**
  - Continued work with CSC and front door services to support educational neglect and safeguard those pupils who are at risk of poor outcomes.
- (3) **Capacity building:**

- 'interim' Safeguarding Officer for Education recruited for 3 months to build capacity within the service and education welfare whilst further re-structuring advances are made to support statutory duties

## **5. Appendices**

- 5.1 Appendix 1 – Table showing finances as requested across varying services sharing the responsibilities outlined.

Appendix 1

	Area/team	Council funded/DSG	Staff	In Post	Vacant	24/25 forecast @ Q2	variance 24/25 @ Q2	25/26 budget	Comments
1. Identifying Children not receiving a suitable education	Elective Home Education Officer(s)	DSG	1.0 fte	0.8fte	0.2fte (TTO)				24/25 was built at 0.6fte (TTO) - now increased to 1.0 fte due to demand - approved Schools Forum March 2024
2. Arranging suitable education for permanently excluded children	Exclusion officer(s) with support of colleagues from i-college*	DSG	1.0 fte	1.0 fte	0				* Unable to quantify value of input from i-college
3. Supporting Fair Access Arrangements	Education Welfare Service	Council funded	0.5fte	0.5fte	0				
4. Supporting Pupils with medical conditions (including Mental Health).	Medical Tuition Service	DSG	4.5fte	2.9fte	1.6fte				One recruitment round unsuccessful – repeat in Jan 25.
Education Welfare Team		Council Funded	2.23fte	1.41fte	0.82fte				This cost centre was previously a trading account. The income would have previously covered the cost to run the service, with an overall negative budget, which was to help support the support services (HR, accounts, legal, it etc). From 23/24 we have been unable to trade, but the income target is still in the budget. Bottom line is to make £13,870 profit on trading in 24/25.



Response to Trevor Keable

									Supporting families helping to improve this position in 24/25 but from 25/26 this funding is unavailable and will cause a further pressure of £33k. Income trading budget is £108k.
Education Welfare Team		DSG	3.11fte	2.21fte	0.9fte				Recruitment underway for EAO replacement and additional capacity to support EHE.
						<b>Total</b>	<b>641,718</b>	<b>-35,322</b>	<b>765,125</b>

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## Schools Forum Work Programme 2024/25

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
<b>Term 4</b>	Work Programme 2025/26			04/03/2025	10/03/2025	Decision	Jessica Bailiss
	Final High Needs Block Budget 2025/26	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Decision	Neil Goddard / Nicola Ponton
	Final Early Years Block Budget 2025/26	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Decision	Lisa Potts / Beth Kelly
	DSG Monitoring 2024/25 Month 10			04/03/2025	10/03/2025	Information	Lisa Potts / Neil Goddard
	Update on the DfE's Delivering Better Value Programme ( <i>standing item</i> )	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Discussion	Hester Collicut
	Deficit Schools ( <i>standing item</i> )	18/02/2025	25/02/2025	04/03/2025	10/03/2025	Information	Lisa Potts

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## Schools' Forum - Contracts - Forward Plan

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

Contract Title	Contract Start Date	Contract End Date (initial term)	Contract End Date (Including any Extension)	Contract Term in years (in brackets maximum possible extension)	Contract Total Value (£) based on Initial Term	Contract Amount (Total Value inclusive of Contract Extension Agreed)	Supplier name	WBC Responsible Officer	Notes
Special Educational Needs and Disabilities (SEND) Information, Advice and Support Service (SENDIASS)	01/08/2021	31/07/2024	31/07/2025	3 (4)	£164,850	£239,500	Rose Road Association	Thomas Ng / Kiki Hurford (supports procurement process only)	This contract is not funded from the DSG and is an Information item only. Spring 2024: one year extension was negotiated between council and provider and approved at Procurement Board
West Berkshire Schools Meals Service	24/07/2020	23/07/2023	23/07/2025	3 (2)	£600000approx	£1,000,000	Caterlink	Kiki Hurford (supports procurement process only)	This has been 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 this contract is included under section 4.3 of the High Needs Block report (Agenda Item 11) due to be considered at the Schools' Forum meeting on 20th January.
Energy Framework - CCS framework RM6011 - Electricity	01/04/2017 (rolling contract since 2008)	01/10/2023	31/03/2025		£5,421,522		EDF (HH)	Adrian Slaughter/Sarah Wood	The central energy contract is a non-mandated contract that maintained schools can access for provision of their gas and electricity. Any schools interested in joining the contract should email <a href="mailto:energymanagement@westberks.gov.uk">energymanagement@westberks.gov.uk</a> 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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