

Notice of Meeting

Schools Forum

**Monday 13 October 2025 at 5.00pm
Via Zoom**

The meeting can be watched live here: www.westberks.gov.uk/schoolsforumlive

Date of despatch of Agenda: Tuesday 6 October 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
e-mail: jessica.bailiss@westberks.gov.uk

Further information and Minutes are also available on the Council's website at www.westberks.gov.uk



Forum Members: Kavash Bamfield, Reverend Mark Bennet, Catherine Bernie, Nicolle Browning, Heather Codling, Iain Cottingham, Paul Davey, Jacquie Davies, David Fitter, Mel Godliman, Richard Hand, Michelle Harrison, Keith Harvey (Vice-Chair), Jon Hewitt, Jo Lagares, Steve Lewis, Julie Lewry, Jo MacArthur, Gary Norman, Chris Prosser, David Ramsden, 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 13 October 2025 (continued)

12 **Contracts Forward Plan**

To Follow

13 **Date of the next meeting**

Monday 1st December 2025 at 5pm on Zoom.

Sarah Clarke
Executive Director - Resources

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

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SCHOOLS FORUM**MINUTES OF THE MEETING HELD ON
MONDAY 14 JULY 2025**

Forum Members Present: Councillor Heather Codling (Executive Portfolio Holder: Children and Family Services), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), Paul Davey (Maintained Primary School Governor), Jackie Davies (Pupil Referral Unit Headteacher), David Fitter (Academy School Headteacher), Mel Godliman (Early Years PVI Settings), Richard Hand (Trade Union), Keith Harvey (Maintained Primary School Headteacher), Jon Hewitt (Maintained Special School Headteacher), Trevor Keable (Academy School Governor), Jo Lagares (Maintained Primary School Headteacher), Jo MacArthur (Maintained Primary School Headteacher), David Ramsden (Maintained Secondary 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), Neil Goddard (Service Director - Education and SEND), Elizabeth Griffiths (Interim Financial Consultant Lead for Management Accounting) and Jessica Bailiss (Democratic Services Officer)

Apologies for inability to attend the meeting: Kavash Bamfield (Maintained Primary School Headteacher), Reverend Mark Bennet (Church of England Diocese), Catherine Bernie (Academy Special School Headteacher), Nicolle Browning (Maintained Secondary School Headteacher), AnnMarie Dodds (Executive Director (Executive Director – People – Children and Family Services), Michelle Harrison (Maintained Primary Schools), Beth Kelly (Head of Early Years), Julie Lewry (Academy School Headteacher), Gary Norman (Academy School Governor), Chris Prosser (Maintained Secondary School Headteacher) and Charlotte Wilson (Academy School Headteacher)

PART I**1 Minutes of previous meeting dated 16th June 2025**

The minutes of the meeting held on 16th July were approved.

2 Actions arising from previous meetings

It was noted that the meetings from the previous meeting had been completed.

3 Declarations of Interest

Phil Spray, Keith Harvey, Paul Davey and Jo Lagares declared an interest in Agenda item 10 (Deficit Schools) due to their school being one of the schools listed within the report.

4 Membership

There were no membership updates.

5 Update from Schools' Forum Task and Finish Group - Governance Review (Chair)

The Chair introduced the report (Agenda Item 6), which provided an update from the first meeting of the Task and Finish Group set up to review the governance of the Schools'

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Forum. Schools' Forums had been a statutory requirement for local authorities since 2003 and had both decision making and consultative duties relating to local education funding. The Chair reported that it was good practice to review practices and terms of reference from time to time to maximise efficiency and purpose, and to ensure that it was meeting current needs and taking note of best practice guidance.

The Task and Finish Group had met on 26th June to make recommendations and had agreed that all members' views were important and should be sought by means of a survey. The Chair thanked Trevor Keable for developing the survey, which Jess Bailiss would circulate during the coming week. All Forum members were encouraged to complete the survey by the deadline of 15th August. This would give the group a chance to review all the answers and report back to the Schools' Forum at their next meeting in October. It was noted that the initial equality impact assessment indicated no impact, but it was hoped the review would lead to positive impacts.

The Chair invited the Forum to consider the recommendations set out in section two of the report that the revised Constitution and Work Programme were brought to the Schools' Forum for consideration in October 2025 to allow more time for the review to take place. It was also recommended that the current Constitution (as agreed in July 2024), membership and draft Work Programme 2025/26 remain in place until October 2025. The recommendations were proposed and seconded and at the vote the motion was approved.

RESOLVED that the recommendations set out under section two of the report were approved.

6 Surplus Balances (Elizabeth Griffiths)

Neil Goddard presented the surplus balances report (Agenda Item 7) recalling the process that had been followed the previous year and the commitment made to addressing surplus balances and clawback more quickly in the current year. He thanked the schools that had responded to the Finance Team with the information that had been requested. He stated that a number of schools had fallen under the surplus balance policy in terms of having more than the prescribed percentage within uncommitted balances through the accounts. He reported that engagement with those schools had taken place to understand the reasons for the surplus, and the same criteria as the previous year had been applied. He noted that there were no proposed clawbacks for the current year because the schools had clear reasons why those balances were being held.

Neil Goddard clarified that the role of the Forum was to agree whether the clawback should be applied and not to engage in a conversation about how the accounts were presented and what the balance was. He said that the paper was labelled as a decision, but there was no decision to be made on this occasion. The area could be closed off and not extended as it had been the previous year.

David Ramsden asked Neil Goddard to talk through the decision-making process regarding clawback for the current year. Neil Goddard detailed that the Finance Team had worked closely with schools in closing accounts more quickly each year. Once the accounts were closed a position for each school was reached and this was set out in the first table under section five of the report. This information was then reviewed against returns each school had made about why they had additional revenue held in their account and what this was for. The LA looked at each school's case and took a view as to whether this was appropriate or not in terms of the surplus balance held. Following this, the LA presented the position to the Forum. The Forum would then need to take a view whether or not to claw back.

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The same process applied the previous year had been applied in the current year but much more efficiently and appropriately. Neil Goddard clarified that the review of the information from each of the schools was an LA decision and was reviewed by Finance colleagues and Education colleagues*.

David Ramsden was glad the process had been applied more efficiently however, expressed concern about the shift from clawing back a significant amount in 2024 to none in 2025. The amount of work involved in the process for the LA and schools needed to be considered, if money was not going to be clawed back going forward. Neil Goddard highlighted that money had been clawed back the previous year, and this might again be the case in future years. The LA did not want to claw back money and there was a learning element involved in having the policy in place, in that it encouraged schools to manage their budgets. David Ramsden felt that clawback needed to act as a deterrent for schools to encourage them to spend money for that year and its children, in year.

Edwin Towill observed the timing issue if claw back had been recommended and suggested that the Task and Finish Group reviewing the function of the HFG and Schools' Forum needed to be aware and consider that the report had been withdrawn from the HFG discussion, which was problematic. The report had been sent to the HFG for comment at around 12 noon on Friday 11th July with a four hour turn around. This did not feel like an efficient way to ask headteachers to comment on a report as important and sensitive. If there had been a request for clawback he did not feel there would have been enough time for a serious discussion on the matter.

Edwin Towill stated that his second observation was that the current year's clawback concerned primary schools however, it was also noted that the report later on the agenda showed that there was an increasing number of schools with deficit budgets. He felt it was likely that the two areas were connected, and he understood why primaries might try to run a surplus budget due to the risk of falling rolls in the future and that they were trying to mitigate against this. He sought reassurance from the LA about a plan to deal with falling rolls. Neil Goddard accepted the point raised about the timings of the report. Secondly, he confirmed that there was a piece of work being undertaken currently around falling rolls. This work would be brought to both the HFG and Forum for discussion.

Keith Harvey questioned how long the LA would wait before clawing back capital funding. Neil Goddard acknowledged a balance was required between saving up to do a big project over time and having it saved up just in case. For almost all the schools on the list, there had been a significant capital project delayed, and funding was linked to an actual capital scheme in the programme. He stated that the same schools should not be on the list ten years down the line vaguely saving for an aspirational capital scheme that might not happen.

Councillor Iain Cottingham understood the LA had a statutory duty to ensure school funding was spent correctly. Clawback was one of the tools available to the LA to help ensure this happened.

Councillor Heather Codling stated that the LA did not want to close any schools. This was however an area under review, but there would be every effort to keep schools open. There was pressure on places in schools as there were not enough children.

David Ramsden proposed tracking responses for clawback more effectively now there was data available.

RESOLVED that the Forum noted the report.

* The Finance Service collates the information returned by schools. This is then reviewed by the Education Service.

7 Scheme for Financing Schools 2025/26 (Elizabeth Griffiths)

Elizabeth Griffiths introduced the report (Agenda Item 8) regarding the Scheme for Financing Schools. The proposed changes had been reviewed by both the HFG and Schools' Forum and then it had gone out for consultation with schools, where the revised version had been supported. It was recommended that the Schools' Forum approve the suggested amendments and publish and adopt the updated SFS.

The Chair invited maintained school members to consider the recommendation. The recommendation to adopt the revised SFS was proposed and seconded and at the vote the motion was carried.

RESOLVED that the Schools' Forum agreed that the revised SFS be adopted and published by 15th July 2025.

8 Delivering Better Value Closing Down Report (Neil Goddard/Hannah Geddert)

Neil Goddard presented the close-down report (Agenda Item 9) for the Delivering Better Value (DBV) programme, thanking Hannah Geddert for her work in managing the DBV process throughout. The report outlined the progress achieved through DBV and set out the next steps and priorities to sustain and build upon this progress. The programme had ceased locally and nationally, and a fully costed Special Educational Needs and Disabilities (SEND) proposal was awaited from the Government within the year.

Neil Goddard noted that local authorities continued to struggle with high deficits in their High Needs Blocks. The vast majority of HNB funding went to schools.

Non-anticipated savings of around £500k had been delivered in year one of DBV through work around transition into reception and avoiding placements in independent schools. The £1m provided by the Government for DBV had now been spent or was still being spent on projects including SEND funding bands, ordinarily available and trauma-informed work around mental health. These projects would come to a natural end at the end of term.

Neil Goddard reported that DBV had been scrutinised heavily by elected Members, the Schools' Forum and the Department for Education (DfE) to ensure figures around savings were as accurate as possible. He added that savings were really cost avoidance, through reducing the rate of increase in the HNB. Overall, it was felt that DBV had been valuable, providing impetus and resources for data and projects. The DfE was due to sign the DBV paperwork off and the LA would then be able to move on.

Trevor Keable sought clarification on the savings achieved compared to the funding received. Neil Goddard clarified that they have been given £1m to reduce the rate of increase against the HNB. The £500k saved in year one had not been expected. It was anticipated that approximately £30 million would be saved by year five. Trevor Keable queried section 7.3 of the report which stated that to maintain momentum, it was essential that work continued to be strategically supported. Neil Goddard referred to the SEND Strategy and action plan that sat underneath this, which was very detailed and would drive work forward. The action plan was overseen by the SEND Improvement Group. Work included a recent review of the Fairer Access Panel, and a budget would be allocated to this panel going forward to support this work. Neil Goddard stated that whilst there was not new money, money was being spent differently. It was hoped the momentum would continue.

RESOLVED that the Schools' Forum noted the report.

9 Deficit Schools (Elizabeth Griffiths)

Elizabeth Griffiths introduced the report (Agenda Item 10), which reported on the outturn position of ten schools that had set a deficit budget in 2024/25 and four further schools that had closed 2024/25 with an unlicensed (unplanned) deficit.

The total deficit for licenced deficit schools was £652k which was an improved position compared the projected amount of £873k. The total deficit for unlicensed deficit schools was £344k.

Paul Davey sought clarification on the sources of information for the report, as he was of the understanding that Enborne Primary had been advised they were not in deficit by the LA's Schools' Finance Department, and he was therefore confused to see the school on the list. Elizabeth Griffiths confirmed that she had investigated this matter, and they could not trace back to the advice provided. Information held for the school showed that the school had closed the year in deficit on the finance system, with insufficient year-end information provided for the closing position to be any different to what was set out in the report. Some of this year end information was still awaited from the school. Paul Davey would take the matter forward with the school.

RESOLVED that the Schools' Forum noted the report.

10 DSG Monitoring 2025/26 Month 3 (Elizabeth Griffiths)

Elizabeth Griffiths introduced the report (Agenda Item 11), which reported the forecast financial position of the services funded by the Dedicated Schools Grant (DSG) for 2025/26, highlighting any under or overspends, and highlighted the cumulative deficit on the DSG.

The report provided the position at Q1 meaning there was a level of uncertainty. The key point to note was that there was a savings target of £14 million, which was the balancing item between expenditure agreed for the DSG and the amount of funding in the DSG. At Q1, no savings had been identified to contribute towards that £14 million. This was the main area that needed to be looked at and mitigated later on in the year.

Elizabeth Griffiths added that they had closed 2024-25 with a cumulative deficit on the DSG of £16 million. If the £14 million remained unmitigated, the deficit would reach £30 million by the end of the year.

Trevor Keable asked for the deficit to be put into perspective compared with other education budgets. Elizabeth Griffiths responded that there were budgets under pressure across the Council, but the DSG deficit for 2024/25 had been equivalent to the deficit across the rest of the Council as a whole. Trevor Keable further asked if the Forum was being asked to do something about it. Elizabeth Griffiths said that the report was for noting however, she had needed to draw attention to the savings target of £14 million, and she was concerned that at Q1 there was no plan to deliver those savings and would like to see some proposals. Trevor Keeble asked if the Forum should be a "pressure group" to address the deficit. Elizabeth Griffiths stated that it was hopeful that something could come forward from the Schools' Team and the Schools' Forum to help mitigate the overspend.

The Chair invited Neil Goddard to comment, and he reiterated that they were extremely dependent on the anticipated announcement from the Government and their approach to managing the overall SEND budget. He added that once this announcement came out, the Schools' Forum would have a key role to play in understanding the implications within the local area. Prior to this point it could be demonstrated how funding was being spent, and he commented that the vast majority of the DSG went to schools. Nationally there did not seem to be an obvious solution and West Berkshire was experiencing the same

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pressures as other LAs, some of which were facing larger deficits. It was important to demonstrate that the money was being spent as efficiently as possible.

Councillor Iain Cottingham highlighted the "snowball effect" of the DSG overspend, projecting a deficit of £73 million by 2027-28. This meant that all borrowing by the LA in 2027/28 would be funding deficit and there would be no funding for capital projects. It was a huge issue for the LA as well as educational professionals and the potential impact upon residents of West Berkshire was very concerning. It was a matter that needed to be grasped by Government.

David Ramsden called for a deficit recovery plan and did not feel they could wait for the Government's announcement. This could then be adjusted accordingly once any announcement was made. He queried if the LA had a deficit recovery plan for the DSG. Neil Goddard stated the DBV plan was the deficit recovery plan, and it had been effective in reducing the rate of increase. He could not put a deficit recovery plan before the Forum that would balance the budget whilst remaining within legally set boundaries. A huge percentage of the DSG went to schools. It was difficult to reduce the amount given to mainstream or special schools as they were already struggling. The aim was to give less to non-maintained independent special schools, and this was how sufficiency was being created. The plan was to spend money as efficiently as possible and focused on sufficiently, and the SEND recovery plan, but this would not balance the budget.

David Ramsden suggested a 10 or 15 year deficit recovery plan was better than nothing. He felt that delaying the statutory override was cowardice on the part of the Government as it did not help anyone. In the meantime, they needed to show to the DfE that they had a plan in place. Neil Goddard reported that there were a set of principles that were applied including early intervention. Statutory areas did not generally include early help services. The dilemma was that if they did not provide early help then need would continue to increase but if early help services were provided then there was not enough money in year one. Managing these elements was a huge dilemma. Neil Goddard reported that the HNB proposed budget would come back to Forum in the autumn and at this point there could be a conversation about where resources could be redirected to help manage the budget.

Paul Davey asked for indication on when information was expected to come out from the Government, to which Neil Goddard felt it was difficult to predict but estimated some information would come forward by the end of the year.

Councillor Iain Cottingham stated that there needed to be more of a fundamental discussion as a country on how social care was funded and that the funding needed to be looked at to ensure best value. He shared the frustration raised by members of the Forum.

Edwin Towell acknowledged the challenges facing the LA but agreed there had been a lack of a plan for a very long period of time. He felt that a 10 or 15 year deficit recovery plan would be reasonable. He understood that the plan was to bring services in house that were currently contracted out to expensive independent special needs provision however, he felt that the lack of a plan was frustrating and it was a concern that there had not been a plan in place for a deficit that had been ballooning over a number of years. There was other LAs with deficit budgets in education and elsewhere that were increasing Council Tax. He appreciated it was not the time to have a discussion about Council Tax, which was a much wider issue, but he was concerned that the lack of a clear plan would have much larger implications.

Neil Goddard understood the frustrations raised. DBV was the plan and had been a huge piece of work. The plan formed as part of this was being executed. The SEND Strategy set out early intervention as the approach to longer term deficit reduction. Neil Goddard

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understood that they were not able to spend Council Tax on the HNB or other DSG areas. Any income was limited to the HNB. Neil Goddard stressed that he would not be able to put a long term plan in front of the Forum that could bring the DSG back into balance that was realistic. He was happy to work with the Forum and go through it in as much detail as possible if they wished. Elizabeth Griffiths clarified that LAs were capped regarding what they could raise through Council Tax unless a referendum was held, which was unlikely to be successful.

Trevor Keable enquired if the Forum should formally ask for a plan to be brought to a future meeting. Neil Goddard responded that the HNB budget would be brought to the Forum in the autumn for scrutiny. This would support the need for a being a joined up and transparent plan going forward that was trackable through the systems in place.

RESOLVED that

- It was noted that the HNB budget would be brought to the Schools' Forum in the Autumn.
- The Schools' Forum noted the report.

11 Contracts Forward Plan

The Schools' Forum noted the contracts forward plan.

12 Date of the next meeting

The next meeting of the Schools' Forum was scheduled for Monday 13th October 2025 at 5pm.

(The meeting commenced at 5.00 pm and closed at 6.15 pm)

CHAIR

Date of Signature

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Agenda Item 3

Actions from previous meetings

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Update
Jun25-Ac3	16th June 2025	DSG Outturn 2024/25	Keith Harvey had written to his MP about the deficit, particularly within the high needs budget, asking for a response from the Secretary of State for Education and would share the reply once received.	Keith Harvey	Response set out below.

From: Olivia Bailey MP |

Sent: Friday, July 25, 2025 9:21:24 PM

Subject: Re: Special Educational Needs Funding (Case Ref: OB06991)

Dear Keith,

Olivia has now received a reply from the department, which I have copied below.

"

Dear Olivia,

Thank you for your correspondence of 6 June, on behalf of a headteacher in your constituency, regarding high needs funding in West Berkshire.

Local authorities (LAs) are statutorily responsible for securing the special educational provision specified in the education, health and care plans they maintain. All LAs must take responsibility for the effective and sustainable management of their high needs systems and associated spending.

However, the government recognises not only that some families and children are not receiving the quality of special educational needs and disabilities (SEND) services and provision they should expect, but also that the rising costs of SEND provision are putting a strain on local government and school finances.

We are committed to fixing the foundations and the additional funding we will be providing by 2028 to 2029 will help to reform the SEND system. As part of the local government funding reform consultations, the government will set out further details on supporting LAs as we transition to a reformed system. Further information on those reforms will be provided in a white paper in the autumn.

West Berkshire was last inspected under the previous Ofsted and Care Quality Commission framework in May 2018. As with all local areas, the department has continued to provide support to West Berkshire through a regional case lead, who seeks regular assurances on the adequacy of SEND provision.

Thank you for writing on this important matter.

*Yours,
Catherine McKinnell*

"

I hope this reply is useful for you. If you would like Olivia and the team to support you with any further matters then please do get in touch.

Kind regards,
Max

Office of Olivia Bailey
MP for Reading West and Mid Berkshire

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Schools' Forum Task and Finish Group: Governance Review

Report being considered by: Schools' Forum on 13th October 2025

Report Author: Schools' Forum Task and Finish Group

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

1. Purpose of the Report

- 1.1 To set out the proposals of the Schools' Forum Task and Finish Group tasked with reviewing the governance of the Schools' Forum and Heads' Funding Group (HFG).
- Number of meetings and meeting format
 - Work Programme for both groups
 - Schools' Forum and HFG Constitution and Terms of Reference

2. Recommendations

- 2.1 That meetings of the Schools' Forum continue to take place online with one in-person meeting per year (location to be confirmed).
- 2.2 That the number of Forum meetings be reduced to five with the addition of a training session for Forum Members.
- 2.3 To approve the Schools' Forum Work Programme for 2025/26 (Appendix B), which has been revised as set out in paragraphs 6.5 to 6.8 of this report.
- 2.4 To approve the proposed report template, which has been revised as set out in paragraph 6.9 of this report, (Appendix C).
- 2.5 To approve the Schools' Forum membership as set out in paragraphs 6.10 to 6.14 of this report (Appendix D).
- 2.6 To approve the Constitution (Appendix E) including the proposed changes set out in paragraphs 6.15 to 6.19.
- 2.7 To approve the establishment of the HFG as a formal sub-group of the Schools' Forum, and to endorse the proposals outlined in section 6.20 of this report (*if approved a section will be added to the Constitution following the meeting, setting out the HFG as a formal sub-group*).

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

Yes: ☒

No: ☐

3. Implications and Impact Assessment

Equalities Impact:	Positive	No Impact	Negative	Commentary

A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		x		The report aims to review and where necessary update the governance of the Schools' Forum. The refreshed Constitution, membership and work programme will be published on the Schools' Forum's webpage.
B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?	x			There will be no adverse impact caused upon the lives of people with protected characteristics, including employees or service users as a result of the decision.
Data Impact:		x		
Consultation and Engagement:	<p>A survey was carried out with Members of the Schools' Forum from 16th July until 15th August. The Schools' Forum Task and Finish Group met on 26th June and 4th September to review the governance and result of the survey.</p> <p>The Heads Funding Group (Meeting on 1st October 2025) WBC officers: Neil Goddard (Service Director – Education), Lisa Potts (Finance Manager), Toby Bradley (Service Lead – Finance) and Jessica Bailiss (Democratic Services Officers)</p>			

4. Introduction/Background

- 4.1 At the Schools' Forum meeting held on 14th June 2025, it was agreed that a working group would be established to review the Constitution and Terms of Reference of both the Schools' Forum and the Heads' Funding Group (HFG), along with the work programmes, number of meetings, and reporting deadlines for both groups. In July 2025 it was agreed by the Schools' Forum that the current version of the Constitution and Work Programme remain in place whilst this work was underway.

5. Supporting Information

Schools' Forum Survey Headline Results:

- 5.1 The Task and Finish Group coordinated a survey over the summer from 16th July until 15th August with all Forum members. The findings from the survey were shared with the Task and Finish Group and discussed at its meeting on 4th September.
- 5.2 The headline results were as follows:
- There were 19 responses to the survey in total.
 - The preferred meeting format was via Zoom (8) followed by hybrid: in-person and via Zoom (7).
 - The majority of those responding would do their best to attend one in-person meeting per year (16).
 - Shaw House was felt by the majority of those who responded (16) to be an appropriate location for an in-person meeting. It was noted however from the comments (3) that this location was more difficult for those travelling from the east of the district.

- 5pm on a Monday was deemed a suitable time for meetings of the Forum by the majority of those who responded (17).
- 9 of those who responded would prefer six meetings per year. The remaining 10 said they would prefer either 4 or 5 meetings.
- The majority of those who responded (14) would like agendas to be reorganised so that items for maintained schools were dealt with last allowing other members to leave.
- The majority of those responded (16) felt that the current size of the Forum was right.
- 9 of those who responded were not sure if there should be other non-school members on the Forum membership and 7 did not believe there should be other non-school members in attendance.
- The majority of those who responded felt that their views were being heard and their expertise was enabling the Forum to come to the correct decision (11). 4 of those who responded were not sure and 4 did not feel this was the case.
- The majority of those who responded (16) understood the role of the Forum and felt that the Forum provided the appropriate forum so that mandated requirements were met.
- The majority (16) felt the Forum discusses what they believed was relevant or needed to be discussed.

5.3 At its meeting on 4th September, the Task and Finish Group used the results of the survey to form a number of proposals, which are set out in section six below.

6. Proposals

Meetings of the Forum:

- 6.1 Based on survey responses it is proposed that meetings of the Forum remain online with one in-person meeting per year (time of year for this meeting tbc). Shaw House was considered to be an appropriate location however, it was noted from the comments that this location was more difficult for those working in the Reading area. Six schools were willing to host an in-person meeting, so the location would alternate between Shaw House and one of these other locations.
- 6.2 The majority of those who responded to the survey were in support of there being six meetings per year. To help increase and support understanding of the role of the Forum, it is proposed by the Task and Finish Group that there be five meetings and one training session per year to be led on by an external body such as the LGA. This training session would also help to reflect on some of the answers provided in the survey around ensuring views are being heard and improving understanding about the role of the Schools' Forum.
- 6.3 It is proposed that the March meeting is removed from the work programme as this is a particularly light meeting in terms of agenda items and does not align with budget Council on 26th February.
- 6.4 Removing the July meeting was also considered however, it was acknowledged that this would be more difficult due to the need to bring the surplus balances and Scheme for Financing Schools items to this meeting.

Schools Forum Work Programme and Agendas:

- 6.5 The work programme for the Schools' Forum was reviewed by the Task Group and items have been re-designated as items for 'decision' or 'discussion/consultation'.
- 6.6 The majority of those responding to the survey wished for agendas to be reorganised so that items for maintained schools were dealt with last, allowing other members to leave. The work programme has therefore been re-organised in line with this.
- 6.7 Items have been reviewed by finance and education officers to ensure that the right items are being brought to the Forum at the right time and to avoid repetition. Changes made to the work programme accordingly. As well as DSG budget monitoring reports there will also be education budget monitoring brought to the Forum going forward.
- 6.8 The proposed new format for the work programme, in line with that set out above, can be seen in Appendix B. *(note: draft for 2026/27 included for information only, and final version will be brought to the Forum in January for consideration and agreement)*

Schools' Forum Report Template:

- 6.9 The Task Group have drafted a revised report template with the inclusion of an executive summary to make it clearer what action is required from the Forum and what information the Forum needs to consider. This report template will need to be used flexibly depending on the nature of the information being presented. The proposed report template can be viewed in Appendix C.

Schools' Forum Membership:

- 6.10 The Schools' Forum currently has 26 members and survey responses suggested that the size of the group was right. Based on this the Task and Finish Group were of the view that the membership should not change at this stage however, this will be reviewed annually as part of the annual review of the membership and Constitution.
- 6.11 It was also noted from the survey that many members of the Forum were unsure if more non-school members should be in attendance or were of the view that this group of members should not be increased in size. The non-school membership is currently in line with the Schools' Forum Regulations and will be reviewed as part of the annual review of the Constitution to ensure this is still the case.
- 6.12 In line with previous years the membership of the Forum has been reviewed to see if the split based on pupil numbers is still correct or needs to be changed. The current breakdown in pupil numbers between the three main groups can be seen in Appendix D (section 1) and the data for 2025 shows that overall, the percentage of pupils in each sector has remained almost the same.
- 6.13 Brookfields Special School converted to an academy in March 2025, and the Schools' Forum Regulations set out that if there are any special academies in the authority's area, at least one academy member must be a representative of a special academy. In line with the Regulations, Brookfields School has therefore been assigned a place on the Forum going forward.
- 6.14 In order to avoid increasing the size of the Forum further, it is proposed that the new special academy representative takes the place of a vacant position within the academy group. This vacancy has remained unfilled since it was added in 2023, and this approach would ensure compliance with the Regulations without expanding

the Forum's overall membership. The proposed updated membership structure for 2025/26 can be seen in Appendix D (section 2).

Schools' Forum's Constitution:

- 6.15 The Schools' Forum's Constitution is reviewed on an annual basis and was last reviewed and approved by the Forum in July 2024. The current Constitution complies with The Schools' Forums' (England) Regulations 2012. There have been no legislative changes over the last year requiring a change to the Forum's current practice.
- 6.16 As part of the Task Group's work the items for decision and consultation listed in the Constitution under Section A, were cross referenced with the DfE's Schools' Forum Powers and responsibilities document for accuracy. It was concluded from this that Section A of the Constitution was largely accurate and only some minor changes were made. The draft areas for decision and consultation can be viewed in paragraphs 1.2 and 1.3 in Section A of the Constitution, attached to this report under Appendix E.
- 6.17 Paragraph 2.1 (Section B Membership of the Forum) has been added to the Constitution to clarify the role of Forum Members.
- 6.18 The Constitution has been amended to include detail on the new academy special school representative under paragraph 2.3.
- 6.19 No further amendments are proposed to the Constitution at this time, but Forum Members are invited to suggest any further changes which they deem necessary or desirable.

The Heads Funding Group:

- 6.20 The Task and Finish Group were of the view that the HFG meetings are currently too close to the meetings of the Forum, reducing their effectiveness and creating repetition. The work of the HFG is recognised and valued and the purpose of this review was to ensure the HFG could be as effective as possible whilst adding transparency. It is therefore proposed that:
 - The HFG be established as a formal sub-group of the Schools' Forum.
 - HFG minutes record only action points and recommendations, and these should be shared with the Schools' Forum.
 - HFG meetings take place earlier in the cycle, enabling the group to provide timely and influential input on matters reported to the Forum. The revised schedule will commence from January 2026 (dates to be confirmed).
 - The Terms of Reference for the HFG be discussed and agreed at both the HFG and Forum meetings in December.
- 6.21 These proposals were discussed by the HFG at its meeting on 1st October:
 - (a) Members of the HFG were in agreement with these proposals, as it adds an additional layer of clarity and oversight to the decision-making process.
 - (b) Members of the HFG agreed that minutes should be short and reflect decisions made for recommendation, rather than full information about discussions that have taken place.

7. Conclusion

- 7.1 The Schools' Forum is invited to approve the recommendations in paragraphs 2.1 to 2.7 of this report.

8. Appendices

- 8.1 Appendix A: Equalities Impact Assessment
- 8.2 Appendix B: Schools's Forum Work Programme
- 8.3 Appendix C: Revised Report Template for the Schools' Forum
- 8.4 Appendix D: Membership Data
- 8.5 Appendix E: Schools Forum Constitution

West Berkshire Council

Equity Impact Assessment

TEMPLATE
March 2023

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10. Section 1: Summary details

Directorate and Service Area	West Berkshire Schools' Forum
What is being assessed (e.g. name of policy, procedure, project, service or proposed service change).	The governance of the Schools' Forum and Heads' Funding Group.
Is this a new or existing function or policy?	Existing
Summary of assessment Briefly summarise the policy or proposed service change. Summarise possible impacts. Does the proposal bias, discriminate or unfairly disadvantage individuals or groups within the community? (following completion of the assessment).	<p>A review of the Schools' Forum in terms of:</p> <ul style="list-style-type: none"> • Number of meetings and meeting format • Membership • Work Programme for both groups • Schools' Forum and HFG Constitution and Terms of Reference <p>Only a positive impact from carrying out this work can be identified.</p> <p>An annual review of the membership helps to ensure that pupils are fairly represented at the Schools' Forum. The refreshed Constitution will be published on the Schools' Forum's webpage.</p>
Completed By	Schools' Forum Task and Finish Group
Authorised By	
Date of Assessment	September 2025

11. Section 2: Detail of proposal

<p>Context / Background Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.</p>	<p>The Schools' Forum Constitution, Membership and Work Programme are reviewed annually and brought to the Forum each July for consideration.</p> <p>At the Schools' Forum meeting on 16th June 2025 it was felt that following a period of change within the Local Authority (LA) and schools, it was a good opportunity to review the Schools' Forum work programme, terms of reference, number of meetings and reporting deadlines. It was proposed that a working group be established to review the terms of reference and work programme for presentation at the July meeting of the Schools' Forum (this was subsequently delayed to the Forum meeting in October to allow more time for the work to take place).</p> <p>A review of the membership was also undertaken to ensure if the split based on pupil numbers is still correct or needs to be changed.</p>
<p>Proposals Explain the detail of the proposals, including why this has been decided as the best course of action.</p>	<p>Set out in Section 6 of the report.</p>
<p>Evidence / Intelligence List and explain any data, consultation outcomes, research findings, feedback from service users and stakeholders etc, that supports your proposals and can help to inform the judgements you make about potential impact on different individuals,</p>	<p>Set out in Section 5 and 6 of the report.</p>

Schools' Forum Task and Finish Group: Governance Review

communities or groups and our ability to deliver our climate commitments.	
Alternatives considered / rejected Summarise any other approaches that have been considered in developing the policy or proposed service change, and the reasons why these were not adopted. This could include reasons why doing nothing is not an option.	Forum Members will be invited to suggest any changes which they deem necessary or desirable.

12. Section 3: Impact Assessment - Protected Characteristics

Protected Characteristic	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
Age	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pupils across the school phases are fairly represented at the Schools' Forum.		Jessica Bailiss	The membership will be reviewed again in 2026.
Disability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			.	
Gender Reassignment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Marriage & Civil Partnership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Pregnancy & Maternity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Schools' Forum Task and Finish Group: Governance Review

Race	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sex	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sexual Orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Religion or Belief	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

13. Section 3: Impact Assessment - Additional Community Impacts

Additional community impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Rural communities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Areas of deprivation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Displaced communities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Care experienced people	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
The Armed Forces Community	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

14. Section 4: Review

Where bias, negative impact or disadvantage is identified, the proposal and/or implementation can be adapted or changed; meaning there is a need for regular review. This review may also be needed to reflect additional data and evidence for a fuller assessment (proportionate to the decision in question). Please state the agreed review timescale for the identified impacts of the policy implementation or service change.

Review Date	September 2025
Person Responsible for Review	Schools' Forum Task and Finish Group
Authorised By	

Draft Schools Forum Work Programme 2025/26

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 5	Election of Chair and Vice-Chair 2025/26			10/06/2025	16/06/2025	Decision	
	Work programme 2025/26			10/06/2025	16/06/2025	Decision	Jessica Bailiss
	School Balances 2024/25	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Discussion/Comment	Lisa Potts
	DSG Outturn 2024/25	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Discussion/Comment	Lisa Potts
	Trade Union Facilities Time - Annual Report for 2024/25			10/06/2025	16/06/2025	Discussion/Comment	Richard Hand
Term 6	Scheme for Financing Schools Consultation 2025/26	14/05/2025	21/05/2025	10/06/2025	16/06/2025	Decision	Lisa Potts
	Update from Schools' Forum Task and Finish Group - Governance Review			08/07/2025	14/07/2025	Decision	Member of the Task and Finish Group
	Scheme for Financing Schools 2025/26	24/06/2025	01/07/2025	08/07/2025	14/07/2025	Decision	Lisa Potts
	Surplus Balances and School Balance Statements	24/06/2025	01/07/2025	08/07/2025	14/07/2025	Decision	Lisa Potts
Term 1	Deficit Schools	24/06/2025	01/07/2025	08/07/2025	14/07/2025	Discussion/Comment	Lisa Potts
	Schools Funding Formula Consultation 2026/27	24/09/2025	01/10/2025	07/10/2025	13/10/2025	Decision	Lisa Potts
	Schools' Forum - Governance Review			07/10/2025	13/10/2025	Decision	Schools' Forum Task and Finish Group (Governance)
	Education Budget Monitoring - Quarter 1			07/10/2025	13/10/2025	Discussion/Comment	Lisa Potts
	DSG Monitoring 2025/26 - Quarter 2			07/10/2025	13/10/2025	Discussion/Comment	Lisa Potts/Neil Goddard
	Vulnerable Children's Fund - Annual Report for 2024/25			07/10/2025	13/10/2025	Discussion/Comment	Vanessa Grizzle
Term 2	Deficit Schools	24/09/2025	01/10/2025	07/10/2025	13/10/2025	Discussion/Comment	Lisa Potts
	Heads' Funding Group Terms of Reference	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	HFG
	School Funding Formula 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	Lisa Potts
	Budgets for Additional Funds 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	Lisa Potts
	Therapeutic Thinking Report	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	Vanessa Grizzle
	Provisional DSG Funding Settlement Overview 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion/Comment	Lisa Potts
	Early Years Budget 2025/26 - In Year Position	24/09/2025	01/10/2025	07/10/2025	13/10/2025	Discussion/Comment	Lisa Potts/Beth Kelly
	Draft Central Schools Block Budget 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion/Comment	Lisa Potts
	High Needs Block Budget Proposals 2026/17	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Discussion/Comment	Neil Goddard/Kirsty Jinks
Term 3	Education Budget Monitoring - Quarter 2			25/11/2025	01/12/2025	Discussion/Comment	Lisa Potts
	Draft De-delegations 2026/27	11/11/2025	18/11/2025	25/11/2025	01/12/2025	Decision	Lisa Potts
	Work Programme 2026/27	24/02/2026	03/03/2026	09/03/2026	16/03/2026	Decision	Jessica Bailiss
	Early Years Funding Rates to Providers and 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Decision	Lisa Potts/Beth Kelly
	Early Years Budget						
	Central School Block Budget Proposals 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Decision	Lisa Potts
	Final DSG Funding Settlement Overview 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion/Comment	Lisa Potts
	Final School Funding 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion/Comment	Lisa Potts
	Growth Fund Applications 2025/26	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion/Comment	Lisa Potts
	High Needs Block Budget Proposals 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion/Comment	Neil Goddard/Kirsty Jinks
Term 3	DSG Monitoring 2025/26 - Quarter 3			13/01/2026	19/01/2026	Discussion/Comment	Lisa Potts/Neil Goddard
	Deficit Schools	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion/Comment	Lisa Potts
	Final De-delegations 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Decision	Lisa Potts
	16th MARCH 2026 - Schools' Forum Training Session - details to be confirmed						

Draft Schools Forum Work Programme 2026/27

Note: Included for information only and will be brought to Schools' Forum in January 2026 for consideration and agreement.

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 5	Election of Chair and Vice-Chair 2026/27	June 2026 - Meeting dates to be confirmed				Decision	
	School Balances 2025/26					Discussion/Comment	Lisa Potts
	DSG Outturn 2025/26					Discussion/Comment	Lisa Potts
	Vulnerable Children's Fund - Annual Report for 2025/26					Discussion/Comment	Vanessa Grizzle
	Trade Union Facilities Time - Annual Report for 2025/26					Discussion/Comment	Richard Hand
	Scheme for Financing Schools Consultation 2026/27					Decision	Lisa Potts
Term 6	Scheme for Financing Schools 2026/27	July 2026 - Meeting dates to be confirmed				Decision	Lisa Potts
	Surplus Balances and School Balance Statements					Decision	Lisa Potts
	Deficit Schools					Discussion/Comment	Lisa Potts
Term 1	Schools Funding Formula Consultation 2027/28	October 2026 - Meeting dates to be confirmed				Decision	Lisa Potts
	Draft High Needs Budget Proposals 2027/28					Discussion/Comment	Neil Goddard/Kirsty Jinks
	Early Years Budget 2026/27 - In Year Position					Discussion/Comment	Lisa Potts
	Education Budget Monitoring - Quarter 1					Discussion/Comment	Lisa Potts
	DSG Monitoring 2026/27 - Quarter 2					Discussion/Comment	Lisa Potts/Neil Goddard
	Deficit Schools					Discussion/Comment	Lisa Potts
	Draft De-delegations 2027/28					Decision	Lisa Potts
Term 2	School Funding Formula 2027/28	December 2026 - Meeting dates to be confirmed				Decision	Lisa Potts
	Budgets for Additional Funds 2027/28					Decision	Lisa Potts
	Provisional DSG Funding Settlement Overview 2026/27					Discussion/Comment	Lisa Potts
	Draft Central Schools Block Budget 2027/28					Discussion/Comment	Lisa Potts
	High Needs Block Budget Proposals 2027/28					Discussion/Comment	Neil Goddard/Kirsty Jinks
	Final De-delegations 2026/27					Decision	Lisa Potts
Term 3	Work Programme 2027/28	January 2027 - Meeting dates to be confirmed				Decision	Jessica Bailiss
	Early Years Funding Rates to Providers and 2026/27					Decision	Lisa Potts/Beth Kelly
	Early Years Budget						
	Central School Block Budget Proposals 2027/28					Decision	Lisa Potts
	Final DSG Funding Settlement Overview 2027/28					Discussion/Comment	Lisa Potts
	Final School Funding 2027/28					Discussion/Comment	Lisa Potts
	Growth Fund Applications 2026/27					Discussion/Comment	Lisa Potts
	High Needs Block Budget Proposals 2027/28					Discussion/Comment	Neil Goddard/Kirsty Jinks
	Education Budget Monitoring - Quarter 2					Discussion/Comment	Lisa Potts
	DSG Monitoring 2025/26 - Quarter 3					Discussion/Comment	Lisa Potts/Neil Goddard
	Deficit Schools					Discussion/Comment	Lisa Potts
MARCH 2027 - Schools' Forum Training Session							

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Report title

Report being considered by: Choose an item.

Date of Meeting:

Report Author:

Item for: Please select: By: Choose an item.

1. Purpose of the Report

This should be succinct and ought to need no more than one paragraph.

2. Recommendation(s)

Consider when drafting this section what you are asking the ultimate decision maker to do. The recommendation should be drafted to clearly reflect the actual decision you require.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: <input type="checkbox"/> <i>If you have checked <u>yes</u> continue to the implications and assessment section.</i>	No: <input type="checkbox"/> <i>If you have checked <u>no</u> please continue to the introduction/background section in section 5.</i>

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?				To assess this you can use the stage 1 EqIA at Appendix A below. Appendix A need not be included if the proposal has a neutral impact on those with protected characteristics. Appendix A must however be included with the report if there are potential impacts on individuals with protected characteristics (positive or negative).

B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?				
Data Impact:				<p>You should consider whether the proposal will have a significant impact on the rights of data subjects?</p> <p>If so, you <u>must</u> complete and include the Data Protection Impact Assessment at Appendix B.</p>

4. Executive Summary

This summary outlines the rationale and proposed options for a decision or consultation to be presented to the West Berkshire Schools' Forum. (To be no more than 2 sides of A4 in total)

Issue Identification

Clearly define the problem being addressed, with reference to measurable impacts on educational outcomes for clearly defined groups of children.

Options Considered

Present a minimum of three and a maximum of five options for addressing the issue, with a balanced assessment of each:

Option 1

- *Advantages*
- *Disadvantages*

Option 2

- *Advantages*
- *Disadvantages*

Option 3

- *Advantages*
- *Disadvantages*

Option 4

- *Advantages*
- *Disadvantages*

Consultation and Engagement

Outline the consultation undertaken to establish the options above, including with individuals and stakeholder groups.

Monitoring and Evaluation

Describe how the Schools' Forum will measure and monitor the outcomes of the decision, including a timetable of progress checks to be scheduled on the Forum's Work Programme.

Recommended Option

This section should provide a short narrative on the recommended option and clearly outline why the recommendation at section 2 is proposed. To include:

- The rationale for the preferred option.
- The anticipated impact on teaching and administrative staff across effected schools.
- Measures to mitigate any negative impacts and safeguard staff wellbeing.
- How these mitigation strategies will be monitored and evaluated.

If there is an opportunity for the Schools' Forum to make a formal response to the Local Authority, please ensure that this is clear within your report.

5. Introduction and background

In this section please provide detailed information supporting the proposal. You must explain the background of the proposal and fully articulate what the report is seeking to achieve.

Provide all relevant background information relating to the recommended option and why it has been brought forward. This section should include the evidence which supports the recommendation.

If this is not a report for decision then provide details of the information that needs to be brought to the Forum's attention.

6. Conclusion

This section should provide a clear conclusion, outlining why the recommendation at paragraph 2 is proposed.

7. View from the Heads' Funding Group

Short summary providing HFG feedback on issue faced and detail of any recommendation(s).

8. Appendices

Either "None" or list:

8.1 Appendix A – Equalities Impact Assessment - DELETE IF NOT REQUIRED

8.2 Appendix B – Data Protection Impact Assessment - DELETE IF NOT REQUIRED

8.3 Appendix C – Other (If required include details here) - DELETE IF NOT REQUIRED

West Berkshire Council Equity Impact Assessment

TEMPLATE
March 2023

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Section 3: Impact Assessment - Protected Characteristics	7
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Section 1: Summary details

Directorate and Service Area	
What is being assessed (e.g. name of policy, procedure, project, service or proposed service change).	
Is this a new or existing function or policy?	
Summary of assessment Briefly summarise the policy or proposed service change. Summarise possible impacts. Does the proposal bias, discriminate or unfairly disadvantage individuals or groups within the community? (following completion of the assessment).	
Completed By	
Authorised By	
Date of Assessment	

Section 2: Detail of proposal

<p>Context / Background Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.</p>	
<p>Proposals Explain the detail of the proposals, including why this has been decided as the best course of action.</p>	
<p>Evidence / Intelligence List and explain any data, consultation outcomes, research findings, feedback from service users and stakeholders etc, that supports your proposals and can help to inform the judgements you make about potential impact on different individuals, communities or groups and our ability to deliver our climate commitments.</p>	

Alternatives considered / rejected Summarise any other approaches that have been considered in developing the policy or proposed service change, and the reasons why these were not adopted. This could include reasons why doing nothing is not an option.	
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Section 3: Impact Assessment - Protected Characteristics

Protected Characteristic	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
Age	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			.	
Gender Reassignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Marriage & Civil Partnership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Pregnancy & Maternity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Race	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Sexual Orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Religion or Belief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Section 3: Impact Assessment - Additional Community Impacts

Additional community impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Rural communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Areas of deprivation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Displaced communities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Care experienced people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
The Armed Forces Community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Section 4: Review

Where bias, negative impact or disadvantage is identified, the proposal and/or implementation can be adapted or changed; meaning there is a need for regular review. This review may also be needed to reflect additional data and evidence for a fuller assessment (proportionate to the decision in question). Please state the agreed review timescale for the identified impacts of the policy implementation or service change.

Review Date	
Person Responsible for Review	
Authorised By	

Appendix B

Data Protection Impact Assessment – Stage One

The General Data Protection Regulations require a Data Protection Impact Assessment (DPIA) for certain projects that have a significant impact on the rights of data subjects.

Should you require additional guidance in completing this assessment, please refer to the Information Management Officer via dp@westberks.gov.uk

Directorate:	
Service:	
Team:	
Lead Officer:	
Title of Project/System:	
Date of Assessment:	

Do you need to do a Data Protection Impact Assessment (DPIA)?

	Yes	No
<p>Will you be processing SENSITIVE or “special category” personal data?</p> <p><i>Note – sensitive personal data is described as “data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, and the processing of genetic data, biometric data for the purpose of uniquely identifying a natural person, data concerning health or data concerning a natural person’s sex life or sexual orientation”</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Will you be processing data on a large scale?</p> <p><i>Note – Large scale might apply to the number of individuals affected OR the volume of data you are processing OR both</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Will your project or system have a “social media” dimension?</p> <p><i>Note – will it have an interactive element which allows users to communicate directly with one another?</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Will any decisions be automated?</p> <p><i>Note – does your system or process involve circumstances where an individual’s input is “scored” or assessed without intervention/review/checking by a human being? Will there be any “profiling” of data subjects?</i></p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Will your project/system involve CCTV or monitoring of an area accessible to the public?</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Will you be using the data you collect to match or cross-reference against another existing set of data?</p>	<input type="checkbox"/>	<input type="checkbox"/>

	Yes	No
Will you be using any novel, or technologically advanced systems or processes?	<input type="checkbox"/>	<input type="checkbox"/>
<small>Note – this could include biometrics, “internet of things” connectivity or anything that is currently not widely utilised</small>		

If you answer “Yes” to any of the above, you will probably need to complete [Data Protection Impact Assessment - Stage Two](#). If you are unsure, please consult with the Information Management Officer before proceeding.

Schools' Forum Membership Data

1. Table 1 below details the current breakdown in pupil numbers between the three main groups shows that overall, the percentage of pupils in each sector has remained almost the same:

TABLE 1	Pupil Numbers (Jan 24 census)		Pupil Numbers (Jan 25 census)	
	Number	%	Number	%
Primary Schools	(61) 11,448	44%	(61) 11,164	43%
Secondary Schools	(3) 4329	17%	(3) 4350	17%
Academy Schools	(13) 10,178	39%	(13) 10,209	40%
TOTAL	25,955	100%	25,723	100%

(The number of schools in each sector is shown in brackets and pupil numbers include nursery and sixth form)

2. The proposed updated membership structure for 2025/26 is shown in Table 2 below:

TABLE 2					
School Members	Heads	Governors	Other	Total	
	Number	Number	Number	Number	%
Primary	4	3	1	8	43%
Secondary	3	0	0	3	17%
Academies	5*	2	0	7	40%
<i>Total</i>	12	5	1	18	100%
Other School Members					
Nursery Schools	1			1	
Special Schools	1			1	
iCollege (PRU)	1			1	
Academy Special Schools	1* (included above)				
<i>Total</i>				3	
Non School Members					
RC Diocese			1	1	
C of E Diocese			1	1	
Early Years PVI			1	1	
Trade Union			1	1	
Non School Post 16			1	1	
<i>Total</i>				5	
TOTAL MEMBERSHIP	15	5	6	26	
Proportion of School Members (minimum must be 66.7%)				80.8%	

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CONSTITUTION OF THE WEST BERKSHIRE SCHOOLS' FORUM

Background

1. The West Berkshire Schools' Forum (hereafter referred to as "the Forum").
2. The requirement to establish a schools forum comes from the Education Act 2002. The main purpose of the Forum is to consider aspects of the relationship between schools and the local authority relating to financial matters.
3. The Forum is a decision making and consultative body in relation to matters concerning schools' budgets as defined in the School and Early Years Finance (England) Regulations 2014, the Schools Forum Regulations 2012 and the School Budget Shares (Prescribed Purposes) (England) 2002. The Schools Forum Regulations 2012 govern the composition, constitution and procedures of Schools' Forums.¹

This document is divided into 3 sections:

- A. Terms of Reference of the West Berkshire Schools' Forum
- B. Membership of the West Berkshire Schools' Forum
- C. Operating Conventions of the West Berkshire Schools' Forum

A. TERMS OF REFERENCE OF THE FORUM

1.1 Status of the Forum

The Forum is established in accordance with Sections 47(1) 47A of the School Standards and Framework Act 1998 and The Schools Forums (England) Regulations 2012.

1.2 Annual Decisions:

The overarching areas on which the Forum makes decisions on Local Authority (LA) proposals are:

- De-delegation from mainstream maintained schools' budgets for prescribed services to be provided centrally.
- To create a fund for significant pupil growth in order to support the LA's duty for place planning and agree the criteria for maintained schools and academies to access this fund.
- To create a fund for falling rolls if a schools' surplus capacity is likely to be needed within the next three years to meet rising pupil numbers and agree the criteria for maintained schools and academies to access this fund.
- Agreeing other centrally retained budgets, including for LA statutory responsibilities.
- Funding for central early years expenditure.

¹ These Regulations can be accessed at: <https://www.legislation.gov.uk/ukxi/2012/2261/contents>

- Approval to move up to 0.5% from the school's block to other blocks.
- Revisions to the LA's Scheme for Financing Schools.
- The Forum's input to the LA's budget-making process.

1.3 Annual Consultation:

The LA must consult the Forum annually in connection with various schools' budget functions, namely:

- Amendments to the school funding formula.
- Changes to the Minimum Funding Guarantee to go to the DfE for approval.
- Funding arrangements for pupils with special educational needs in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding.
- Funding arrangements for the use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools, and the arrangements for paying top-up funding.
- Funding arrangements for early years provision.
- Central spend on children and young people with high needs.
- Central spend on licenses negotiated centrally by the Secretary of State.
- Administrative arrangements for the allocation of central government grants paid to schools via the LA.
- Where the LA is entering a contract to be funded from the school's budget, that is in excess of the Public Contracts Regulations procurement thresholds.
- Any DfE consultations and changes to school funding for which the Forum's views are sought.

B. MEMBERSHIP OF THE FORUM

2.1 Membership

Forum Members are expected to take a strategic view of the whole education system while also advocating for the group they represent.

2.2 Composition

Schools' Forums' Regulations 2012 state that the primary schools, secondary schools and academies must be broadly proportionately represented on the Forum having regard to the total number of registered pupils. The proportionality of the membership will be reviewed annually (in June/July) so that elections, if required, can be held by the end of the summer term ready for the new academic year.

The Forum shall in total comprise of 26 members being 21 school members (including Academies) and 5 non school members. The school members shall be Headteachers, Governors or Early Years representatives drawn from the schools / partnerships in the West Berkshire LA area. The Primary and Secondary Headteacher members groups may also include, at the LA's discretion, representatives of Headteachers - senior members of staff, such as School Business Managers.

The LA has the discretion to divide the groups set out below in 2.2, for example the ratio of Headteachers or their Representatives and Governors in each group.

2.3 School Members

The current number of representatives in each phase is as follows:

- a) Primary Headteachers or their Representative and Governors**
8 representatives from primary schools of which at least 4 must be Headteachers or their representative.
- b) Secondary Headteachers or their Representative and Governors**
3 representatives from secondary schools of which at least 2 must be Headteachers or their representative.
- c) Special School Representatives**
1 representative from the special schools.
- d) Nursery School Representatives**
1 representative from the nursery schools.
- e) Pupil Referral Unit Headteachers or their Representative**
1 representative from the Pupil Referral Units.
- f) Academy Proprietor Body Representative, Headteachers/their Representative and Governors**
7 representatives from the Academies, as elected by the proprietors of the Academies, of which at least 4 must be Proprietor Body Representatives/Headteachers or their representative. 1 Academy representative must be from an Academy Special School.

2.4 Election of Schools Members

The primary school and secondary school headteacher representatives shall be elected by their respective Heads Forum.

Academy representatives shall be elected by the Academies proprietors.

Governors shall be elected through an election process coordinated by the Clerk to the Schools' Forum.

The special school representative shall be elected by mutual agreement between the two special schools.

The nursery school representative shall be elected by mutual agreement between the two nursery schools.

The pupil referral unit representative shall be elected by mutual consent between the pupil referral units.

Support can be requested by Heads' Forums for the Clerk to the Schools' Forum to help manage their election process. The Clerk of the Schools' Forum must make a record of the process by which the constituents of each group elect their nominees to the Forum.

There should be no more than two representatives from one school/academy across the groups that make up the Schools' Forum. This will be assessed as part of the election process.

An election scheme must take into account the following factors:

- The process for collecting names of those wishing to stand for election.
- The timescale for notifying all constituents of the election and those standing.
- The arrangements for dispatching and receiving ballots.
- The arrangements for counting and publicising the results.
- Any arrangements for unusual circumstances, such as only one candidate standing in an election or where there is a tie between two or more candidates.
- Whether existing members can stand for re-election.

If an election does not take place by any date set by the LA or any such election results in a tie between two or more candidates the LAy will appoint the schools member.

2.5 Non-School Members

In addition to the 21 school members a representative of the following groups will have full voting rights within the Forum except for voting on the funding formulae where only the Early Years PVI Provider representative can vote:

- Roman Catholic Diocese
- Church of England Diocese
- Trade Union
- Early Years PVI Provider
- Non school Post 16

The representative will be elected by their group and the record of the appointment process will be held by the Clerk of the Schools' Forum.

2.6 Substitute Members

Representative groups may nominate permanent substitutes who have sufficient experience and knowledge of schools funding to attend meetings.

and/or

A stand-in substitute who attends as a full voting member if a headteacher or permanent substitute is unavailable. Stand-in substitutes may attend some meetings as an observer to gain an insight into the work of the Forum.

The Clerk must be notified in writing 24 hours before the start of the meeting that a substitution will be required. Substitute members will have full voting rights when taking the place of the substantive member for whom they are the designated substitute.

2.7 Participation of Observers

Observers shall be invited to attend Forum meetings. Observers may participate in the debate but will not have voting rights should any business of the Forum require a vote. The following groups shall be asked if they would like to nominate an observer (and a named substitute) to the Forum:

- The Education and Skills Funding Agency (ESFA)

2.8 Council Officers and Elected Members

The following may attend and speak at Forum meetings in an advisory capacity only and will be invited to attend Forum meetings:

- Executive Director (Children's Services) or their representative
- Service Director - Finance, Property and Procurement or their representative
- Children and Young People Portfolio Holder
- Finance Portfolio Holder
- Clerk to the Schools' Forum

2.9 Terms of Office

The term of office for members of the Forum is four years. The same members can be reappointed providing they are re-elected by the group that they represent. This also applies to any permanent substitutes. A Governor representative reaching the end of their term can stand again for re-election through an election process run by the Schools' Forum Clerk.

As well as the term of office coming to an end, a schools member ceases to be a member of the Schools' Forum if he or she resigns from the Forum, giving at least one month's written notice, or no longer occupies the office which he or she was nominated to represent. An election should be held within the outgoing members electing group to nominate a successor. The Clerk will then inform the Forum members of the result of the election within one month.

2.10 Failure to attend meetings

Where a member of the Schools' Forum fails throughout a period of six consecutive months from the date of their last attendance to attend a meeting of the Forum (or to organise for an appropriate substitute to attend on their behalf), then subject to certain exceptions, they will cease to be a member of the Schools' Forum unless the failure was due to some reason approved before the expiry of that period.

C. OPERATING CONVENTIONS OF THE WEST BERKSHIRE SCHOOLS FORUM

3.1 Ordinary Meetings

An ordinary meeting of the Forum shall be held, at a minimum, four times a year.

3.2 Administration of Meetings

Meetings of the Forum shall be convened by the LA, who will arrange the clerking and recording of meetings. The cycle of annual meetings is based on the financial year. All the meeting dates for the next financial year are set by the end of March every year.

Items for consideration by the Forum shall be submitted to the Clerk no later than ten working days prior to the meeting. The agenda and working papers should be circulated a week in advance of the meeting date. Every effort should be made to circulate draft minutes to Forum members within ten working days of the meeting.

3.3 The Chair and Vice Chair

The Chair and Vice-Chair shall be elected from within the membership of the Schools' Forum (but may not be either an elected member or an officer of the local authority).

3.4 Quorum

The Forum shall be quorate if at least 40% of the total membership is present (this excludes observers). If the Forum is not quorate the meeting can proceed and the members present can give advice to the LA, but the authority is not obliged to take that advice into consideration. Decisions on the schools' budgets may not be taken unless 40% of the school members (Headteachers and Governors) are present.

3.5 Voting

Each member shall only have one vote. Voting shall be by a named vote if the meeting is held virtually or by a show of hands if in person. If there are equal numbers of votes for and against, the Chair will have a second or casting vote. There will be no restriction on how the Chair chooses to exercise a casting vote.

When the vote is on the schools funding formula only the schools' members and the Early Years Representative are eligible to vote.

3.6 Sub-Committees and Working Groups

The Forum may have sub-committees or working groups. The Forum shall receive reports from the sub-committees or working groups to approve formally.

3.7 Declaration of Interest

Any member of the Forum who has an interest in any proposal, beyond the generality of the group that they represent, shall declare the interest at the beginning of the relevant item. Should the member declare a prejudicial interest then they can explain any issues to the meeting and then must leave the meeting until the item has finished. The member cannot vote on that item. Members may remain in the case of a personal interest.

Where it is clear that a decision in which a member has an interest is likely to arise at a particular meeting, the meeting concerned may invite a substitute member (with no interest to declare) in accordance with the Constitution to attend the meeting in their place. Elected members are subject to the governance of the Council's Code of Conduct.

3.8 Status of Reports

All report authors will be responsible for informing the Clerk in advance of the status of reports to be included in the agenda i.e. confidential or non-confidential.

3.9 Expenses

The LA shall maintain a budget for the reimbursement of all reasonable expenses relating to the operation of the Forum and charge these expenses to the Schools' Budget. The LA shall reimburse expenses of members of the Forum when members submit appropriate claims, in connection with attendance at the meetings. Supply cover should only be claimed when it has been necessary to employ a supply cover teacher to enable the Headteacher to attend the Forum.

3.10 Interpretation of the Constitution

The Chair or person presiding at the meeting shall be the final arbiter regarding the interpretation of the Forum's Constitution. The Constitution shall be interpreted in conjunction with the relevant provisions contained in the legislation relating to the Forum's

proceedings. The requirements of legislation will prevail in the event of there being any inconsistency between the legislation and the Constitution.

3.11 Amendment of the Constitution

With the exception of matters subject to legislative provision or approval by the authority, the Forum may vary its Constitution by a simple majority vote by the members provided that prior notice of the nature of the proposed variation is made and included on the agenda for the meeting.

3.12 Publicity relating to the Schools Forum

The Schools Forum is a public meeting, and the LA is responsible for putting the Schools' Forum papers, minutes and decisions promptly on the West Berkshire Council website and generally draw schools attention to forthcoming Schools' Forum meetings and agendas and the minutes of Forum discussions.

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Consultation 2026/27: Schools Funding Formula

Report being considered by: Heads' Funding Group on 1st October 2025

Report Author: Lisa Potts

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

1. Purpose of the Report

- 1.1 To set out the requirements and changes for setting the primary and secondary school funding formula for 2026/27 and to approve West Berkshire Council's funding proposals to go out to consultation with all schools.
- 1.2 In previous years, the DfE has announced provisional financial settlement information for each LA for the upcoming financial year by the end of July. This generally includes confirmed NFF per pupil funding rates to be paid to each individual LA and details of how funding rates and any other elements of the Funding Framework have changed.
- 1.3 The 2026-27 schools NFF will use the same factors as the 2025-26 NFF. However, the notional NFF allocations for schools for 2026-27 are yet to be published. It is expected they will be published in Autumn 2025, delayed due to the multi-year spending review concluding in June 2025. Due to the delay in the confirmation the NFF factor values, a modelling authority proforma tool (APT) for 2026/27 will not be provided.
- 1.4 A key feature of the budget setting process is the consultation with schools. This takes place each year for the Schools Forum to consider the outcomes early in the autumn. Despite the lack of notional allocations and confirmed factor values, it is important to still seek views from schools on the relevant areas of the budget that remain subject to local decision making.

2. Recommendations

- 2.1 Recommend to Schools Forum the consultation to be undertaken with all schools on:
 - (1) West Berkshire Council's proposed school funding formula for 2026/27
 - (2) An up to 0.5% transfer from the Schools Block to other funding blocks
 - (3) The criteria to be used to allocate additional funds
 - (4) The proposed services to be de-delegated.
- 2.2 The proposed areas of consultation will be decided by Schools Forum at its meeting of 13 October 2025. The consultation will be open for just over three weeks from 15 October 2025 to 7 November 2025. The principle consulted on and adopted in previous years, is to mirror as closely as possible to the NFF.

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

3. Implications and Impact Assessment

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

4. Introduction

- 4.1 2026/27 is the fourth year of transition to the direct schools National Funding Formula (NFF). Each Local Authority (LA) will continue to have some discretion over their schools funding formulae, in consultation with local schools.
- 4.2 The LA will remain responsible for determining final allocations to schools, in consultation with the Schools Forum. Political ratification must be obtained before the end of January 2026 deadline for submission.

5. National Funding Formula

- 5.1 2026/27 is the fourth year of transition to the direct schools NFF. Local authorities:

- (1) Must use all NFF factors other than the following optional factors: rates, PFI contracts and exceptional circumstances
 - (2) Will only be allowed to use NFF factors in their local formulae.
 - (3) Must move their local formula factor values at least 10% closer to the NFF, except where local formulae are already 'mirroring' the NFF.
 - (4) Will continue to set a minimum funding guarantee in local formulae
 - (5) Will again be able to transfer up to 0.5% of their total schools block allocations to other blocks of the DSG, with Schools Forum agreement. Without Schools Forum agreement, or where they wish to transfer more than 0.5% of their schools block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.
- 5.2 School funding through the NFF per pupil increases have yet to be confirmed in 2026/27.
- 5.3 High needs funding increases are yet to be announced for 2026/27.
- 5.4 The DfE recognises that some authorities still cannot afford to pay off the historic deficit from the DSG over the next few years. The DfE runs three programmes offering direct support to ensure effectiveness and sustainability of local authorities' high needs systems. West Berkshire is in group b, DBV.
- (a) Safety valve
 - (b) Delivering better value in SEND (DBV)
 - (c) ESFA support programme.
- 5.5 Central schools services funding in 2026/27 is yet to be announced. This funds the ongoing responsibilities that LAs deliver for all pupils.

6. Schools funding allocation

- 6.1 Yet to be announced. Expected in the Autumn.

7. Local Formula

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

8. Block Transfers

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

to the Secretary of State by 17th November 2025. Evidence of Schools Forum discussion and voting would need to be provided.

- 8.3 The growth in the DSG deficit continues to be a significant challenge. The deficit grew from £9.5m in 2023/24 to £16.1m in 2024/2 and is forecast to reach £29.8m by the end of 2025/26. This is driven by the challenges in the High Needs Block and consideration should therefore be given as to whether to support a block transfer for 2026/27.

Reserve Balances (surplus)/deficit	1.4.2024 Actual	Movement	1.4.2025 Actual	Forecast Movement	31.3.2026 Forecast
	£m	£m	£m	£m	£m
Schools Block	(1,090)	(57)	(1,146)	57	(1,090)
Early Years Block	1,261	(335)	926	(37)	890
Central School Services Block	1	(2)	(1)	(5)	(5)
High Needs Block	9,336	8,536	17,872	13,663	31,534
Clawback processed 24/25	0	(1,518)	(1,518)	0	(1,518)
Grant changes	(58)	58	(0)	0	0
Total Deficit Balance	9,450	6,682	16,132	13,678	29,811

- 8.4 Block transfers need to be approved annually. Transfers have previously been approved in 2020/21 0.25% (£263k), 2021/22 0.5% (£549k), 2022/23 0.25% (£300k) and 2024/25 0.25% (£335k) to support the High Needs Block. No transfer was approved in 2023/24 or 2025/26.

9. Additional funds outside the School Formula

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

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

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

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

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

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

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

11. Proposals

- 11.1 To approve the attached consultation to go out to all schools. The consultation will last for 3 weeks from 15 October 2025 to 7 November 2025.

12. Conclusion

- 12.1 Since the government intends to move towards a “hard” NFF formula it is logical for West Berkshire to continue to replicate these rates as far as possible.
- 12.2 When the actual allocation is received in December the formula will be allocated according to the principles above with political ratification being made in January 2026.

13. Appendices

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

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Appendix A

Schools Revenue Funding 2026 to 2027

Briefing & Consultation Document for Schools October 2025

1. How to respond to this consultation

- 1.1 Schools are invited to make comments on specific areas in the consultation. Please e-mail your response to Lisa Potts, Finance Manager, lisa.potts@westberks.gov.uk by **5th November 2025**.
- 1.2 Any suggestions for change should be accompanied by clear rationale on why your proposal is a better solution and fair and equitable for all schools in West Berkshire Council (WBC), and not just for your own individual school. You should also check that it falls within the current funding regulations. Policy and operational documents relating to the 2026/27 National Funding Formula (NFF) can be accessed on this webpage:

[Pre-16 schools funding: local authority guidance for 2026 to 2027 - GOV.UK](#)
- 1.3 To aid understanding of the proposals in this paper, illustrations are provided in Appendix Ai) 1 for individual schools. These are based on Department for Education (DfE) data taken from the October 2024 census. This paper currently shows the 25/26 funding which will be updated in due course.
- 1.4 Schools should note that actual funding for 2026/27 will be based on the October 2025 pupil census and year on year changes in pupil data may have a significant impact. Therefore, in responding to this consultation, schools are advised to concentrate on the principles rather than simply on the illustrative cash changes.

2. Purpose

- 2.1 The purpose of this consultation is to outline and seek views on:
 - (1) West Berkshire Council's proposed school funding formula for 2026/27.
 - (2) An up to 0.5% transfer from the Schools Block to other funding blocks.
 - (3) The criteria to be used to allocate additional funds.
 - (4) The proposed services to be de-delegated.
- 2.2 The proposed areas of consultation will be decided by Schools Forum at its meeting of 13 October 2025. The consultation will be open for just over three weeks from 15 October 2025 to 7 November 2025. The principle consulted on and adopted in previous years, is to mirror as closely as possible to the NFF.

3. Introduction

- 3.1 All mainstream (academies and maintained) school funding is allocated to the Local Authority (LA) through the Dedicated Schools Grant (DSG). The grant is split into four funding blocks:
- (1) Schools,
 - (2) Early years,
 - (3) High needs,
 - (4) Central Schools Services (including school admissions, licences, finance support, schools' forum costs, education welfare etc).
- 3.2 The Schools Block is only for Primary and Secondary school formula allocations, plus growth funding for new or growing schools (such pupils are not included in the funding allocation as they did not exist in the previous census).
- 3.3 The Schools Block is ring fenced, but up to 0.5% can be transferred to other funding blocks subject to consultation with all schools and Schools' Forum agreement. Secretary of State approval is required for transfers above this limit or where the Schools' Forum has opposed the transfer but the LA wishes to appeal.
- 3.4 2026/27 is the fourth year of transition to the direct schools National Funding Formula (NFF). Local authorities:
- (1) Must use all NFF factors other than the following optional factors: rates, PFI contracts and exceptional circumstances
 - (2) Will only be allowed to use NFF factors in their local formulae.
 - (3) Must move their local formula factor values at least 10% closer to the NFF, except where local formulae are already 'mirroring' the NFF. (local factors within 2.5% of the respective NFF values are deemed to be mirroring the NFF).
 - (4) Will continue to set a minimum funding guarantee in local formulae, which in 2025/26 was between -0.5% and 0.0% per pupil.
 - (5) Will again be able to transfer up to 0.5% of their total schools block allocations to other blocks of the DSG, with schools forum approval. Without schools forum agreement, or where they wish to transfer more than 0.5% of their schools block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.
- 3.5 The LA is responsible for making the final decisions on the formula. Political ratification must be obtained before the end of January 2026 deadline.

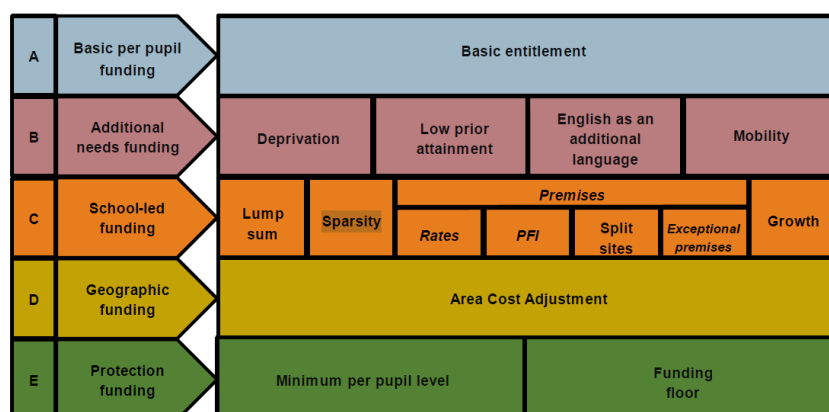
The notional NFF allocations for schools for 2026/27 are to be published in Autumn 2025 due to the multi-year spending review concluding in June 2025. Due to the delay in the confirmation the NFF factor values, a modelling authority proforma tool (APT) for 2026/27 will not be provided.

- In December 2025 the funding allocations will be published using the October 2025 pupil numbers alongside the Schools Block DSG allocation.

- A sum for growth funding and falling rolls will be added to give the final DSG total.

4. The National Funding Formula (NFF)

4.1 The NFF structure is shown in the chart below.



The 2026 to 2027 schools NFF will use the same factors as the 2025 to 2026 NFF.

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

4.3 The NFF in 2026 to 2027 will continue to provide funding protections

- minimum per pupil levels (MPPLs) - the MPPLs guarantee a minimum amount of funding for every pupil
- the funding floor protects schools from year-on-year funding decreases, by ensuring a minimum increase in pupil-led funding per pupil compared to the previous year. The NFF in 2026 to 2027 will continue to provide funding protections

4.4 The schools budget support grant (SBSG) and the National Insurance contributions (NICs) grant will be rolled into the NFF for 2026 to 2027.

4.5 The table below sets out the national rates and West Berkshire's cost adjusted rates. This is still based on 2025/26 funding as 2026/27 is not yet available.

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 and 0.25% transfer	Total Funding after 0% transfer & growth funding
	2024/25			2025/26			2024/25	2025/26
Basic per pupil funding								
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
Minimum per pupil								
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		
Additional needs funding								
Deprivation								
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		
Low Prior Attainment								
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
English as an Additional Language								
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
Mobility								
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
School led funding								
Lump Sum								
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		
Sparsity								
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		
Premises								
Primary							£1,799,164	£1,929,400
Secondary								
Total Allocation (excluding minimum per pupil funding level and MFG funding total)							£133,479,868	£143,331,891
Additional funding to meet the minimum funding level							£178,812	£145,064
Total Allocation including minimum funding adj							£133,658,680	£143,476,954
MFG adjustment							£25,021	£89,329
Total funding for Schools Block Formula							£133,683,700	£143,566,283
Other adjustments								
Growth fund							£0	£0
Total funding for Schools Block Formula							£133,683,700	£143,566,283
Amount of block transfer							£335,047	£0
NNDR allocation							-£1,832,054	-£1,929,400
DSG Schools Block DfE allocation							£132,186,693	£141,636,883

4.6 The funding above is for 2025/26, but will change as follows:

- (1) The final funding allocation has yet to be announced but will reflect the October 2025 pupil numbers and the 2026/27 rates.
- (2) The final allocation will reflect pupil characteristics (such as deprivation and prior attainment) as at October 2024.
- (3) A block transfer may or may not be approved by the Schools Forum.
- (4) Growth and falling rolls funding will be added for 2026/27.

5. Sparsity

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

6. Block Transfers

- 6.1 Local authorities continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG, with schools forum approval. If approved, this would enable a transfer of in the region of £700k. These figures are estimates based on indicative NFF funding (October 2024 census pupil data).
- 6.2 Without schools forum agreement, or where they wish to transfer more than 0.5% of their schools block funding, local authorities must submit a disapplication request to the Secretary of State by 17th November 2025. Evidence of schools forum discussion and voting would need to be provided.
- 6.3 Setting a balanced budget for the High Needs Block continues to be a significant challenge; funding received for this block has seen increases not keeping pace with demand in terms of numbers of high needs pupils and unit costs of provision. This has resulted in an increasing deficit on the DSG as shown below:

Reserve Balances (surplus)/deficit	1.4.2024 Actual	Movement	1.4.2025 Actual	Forecast Movement	31.3.2026 Forecast @ Q1
	£m	£m	£m	£m	£m
Schools Block	(1,090)	(57)	(1,146)	57	(1,090)
Early Years Block	1,261	(335)	926	(37)	890
Central School Services Block	1	(2)	(1)	(5)	(5)
High Needs Block	9,336	8,536	17,872	13,663	31,534
Clawback processed 24/25	0	(1,518)	(1,518)	0	(1,518)
Grant changes	(58)	58	(0)	0	0
Total Deficit Balance	9,450	6,682	16,132	13,678	29,811

- 6.4 The DSG year-end position at the end of 2023/24 was a deficit of £9.45m and rose to £16.1m by 2024/25. The forecast deficit at the end of 2025/26 is £29.8m.
- 6.5 It is proposed that the HFG considers allocation of 0.5 % of the Schools Block (approx. £700,000) or 0.25% of the Schools Block (approx.£350,000).
- 6.6 Block transfers need to be approved annually. Transfers have previously been approved in 2020/21 0.25% (£263k), 2021/22 0.5% (£549k), 2022/23 0.25% (£300k)

and 2024/25 0.25% £335k to support the High Needs Block. No transfer was approved in 2023/24 or 25/26.

7. Local Formula

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

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

7.2 Appendix Ai) shows:

- (1) The 2025/26 final allocations per school vs the 2024/25 NFF allocation.

7.3 Actual individual school allocations will be dependent on the October 2025 census and the 2026/27 funding rates.

8. Additional Funds outside the School Formula

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

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

has surplus places and faces a funding shortfall but an increase in pupils in the near future is expected. In 2018/19 the Schools Forum agreed to cease the Falling Rolls fund.

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

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

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

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

Primary and Secondary only:

- Promoting Inclusive Practice Service
- Ethnic Minority Support
- Trade Union Local Representation
- CLEAPSS
- School Improvement

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

All Maintained Schools:

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

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

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

9.5 Information about these services is reported to the Schools' Forum on an annual basis. The final decision on each service will be made by the relevant Schools' Forum Members for each phase by the end of January 2026. Schools may wish to contact their Schools' Forum representative direct to express their view, or respond as part of this consultation.

10. Consultation Proposals

1. Do you agree that, subject to final affordability, West Berkshire should mirror the DfE's 2026/27 NFF as closely as possible and that this formula should be used to calculate funding allocations? Yes/No

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

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

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

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

11. Timetable

11.1 The timetable for determining the school formula and schools budgets for 2026/27 is as follows:

Date	Who	Item
Autumn 2025	DfE	Operational guidance published
Autumn 2025	LA	Modelling of new primary & secondary school formula
01.10.25	HFG	Approve consultation proposals
13.10.25	SF	Approve consultation proposals
15.10.25 – 5.11.25	Schools	School funding formula consultation with schools.
18.11.25	HFG	Review school formula consultation responses and make recommendation to Schools' Forum.
01.12.25	SF	Review school formula consultation responses.
Mid Dec 2024	DfE	DSG funding allocations and APT containing census data for final formula issued
Mid Dec 2024	LA	Updating by officers of formula and the funding rates in light of actual DSG funding
14.01.26	HFG	Review final proposals and make recommendation to Schools' Forum.
19.01.26	SF	Review HFG recommendations, final calculations and final formula.
By end Jan 26	Political ratification	Approval of School Formula
By end Jan 26	LA	Deadline for submission of final APT to DfE
28.2.26	LA	Statutory deadline for providing primary and secondary maintained schools with funding allocation

12. Appendices

12.1 Appendix Ai) 1 - 2025/26 funding allocations (to be updated with 2026/27 figures)

12.2 Appendix B – Criteria for awarding Growth Funding

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

12.4 Appendix D – Equalities Impact Assessment

Appendix Ai)

2025/26 School Formula Allocations

		2024/25			2025/26			YEAR ON YEAR CHANGE			
		FINAL ALLOCATION (after 0.25% HNB transfer)			FINAL ALLOCATION (after 0% HNB transfer)						
School	Phase	Pupil count (Oct 23)	Formula allocated	Per pupil funding	Pupil count (Oct 24)	Formula allocated	Per pupil funding	Increase in total cash	Change in pupils	Increase in per pupil total funding	% change
Aldermaston C.E. Primary School	Primary	103	£678,863	£6,591	116	£790,279	£6,813	£111,416	13	£222	16%
Basildon C.E. Primary School	Primary	150	£764,729	£5,098	156	£851,131	£5,456	£86,402	6	£358	11%
Beedon C.E. (Controlled) Primary School	Primary	35	£373,199	£10,663	22	£337,325	£15,333	£-35,875	-13	£4,670	-10%
Beenham Primary School	Primary	58	£482,743	£8,323	45	£449,004	£9,978	£-33,740	-13	£1,655	-7%
Birch Copse Primary School	Primary	414	£1,937,468	£4,680	417	£2,097,084	£5,029	£159,616	3	£349	8%
Bradfield C.E. Primary School	Primary	148	£770,799	£5,208	150	£835,536	£5,570	£64,737	2	£362	8%
Brightwalton C.E. Aided Primary School	Primary	93	£560,736	£6,029	87	£584,932	£6,723	£24,196	-6	£694	4%
Brimpton C.E. Primary School	Primary	53	£443,554	£8,369	47	£441,958	£9,403	£-1,597	-6	£1,034	0%
Bucklebury C.E. Primary School	Primary	107	£630,807	£5,895	113	£708,186	£6,267	£77,379	6	£372	12%
Burghfield St Mary's C.E. Primary School	Primary	190	£962,434	£5,065	207	£1,134,785	£5,482	£172,351	17	£417	18%
Calcot Infant School and Nursery	Primary	191	£1,035,507	£5,422	170	£1,005,706	£5,916	£-29,801	-21	£494	-3%
Calcot Junior School	Primary	273	£1,435,347	£5,258	261	£1,481,322	£5,676	£45,974	-12	£418	3%
Chaddleworth St Andrew's C.E. Primary School	Primary	27	£328,324	£12,160	26	£342,718	£13,181	£14,394	-1	£1,021	4%
Chieveley Primary School	Primary	177	£899,008	£5,079	171	£943,216	£5,516	£44,208	-6	£437	5%
Cold Ash St Mark's C.E. School	Primary	195	£936,081	£4,800	203	£1,038,601	£5,116	£102,520	8	£316	11%
Compton C.E. Primary School	Primary	179	£945,922	£5,284	166	£955,706	£5,757	£9,783	-13	£473	1%
Curridge Primary School	Primary	82	£509,414	£6,212	96	£632,001	£6,583	£122,586	14	£371	24%
Denefield School	Secondary	971	£6,195,305	£6,380	963	£6,684,961	£6,942	£489,656	-8	£561	8%
Downsway Primary School	Primary	212	£1,025,198	£4,836	212	£1,134,817	£5,254	£88,618	0	£418	9%
Enborne C.E. Primary School	Primary	75	£491,776	£6,557	81	£551,575	£6,810	£59,799	6	£253	12%
Englefield C.E. Primary School	Primary	109	£575,273	£5,278	110	£628,495	£5,714	£53,222	1	£436	9%
Falkland Primary School	Primary	420	£1,964,104	£4,676	411	£2,066,262	£5,027	£102,158	-9	£351	5%
Fir Tree Primary School and Nursery	Primary	206	£1,149,166	£5,578	211	£1,263,766	£5,989	£114,599	5	£411	10%
Francis Baily Primary School	Primary	524	£2,477,611	£4,728	531	£2,707,801	£5,099	£230,190	7	£371	9%
Garland Junior School	Primary	220	£1,163,795	£5,290	185	£1,080,262	£5,839	£-83,533	-35	£549	-7%
Hampstead Norreys C.E. Primary School	Primary	67	£512,736	£7,653	49	£459,664	£9,381	£-53,071	-18	£1,728	-10%
Hermitage Primary School	Primary	188	£938,454	£4,992	172	£945,825	£5,499	£7,371	-16	£507	1%
Highwood Copse Primary School	Primary	98.5	£574,925	£5,837	137.5	£791,357	£5,755	£216,433	39	£-81	38%
Hungerford Primary School	Primary	346	£1,772,871	£5,124	328	£1,841,185	£5,613	£68,314	-18	£489	4%
Inkpen Primary School	Primary	48	£421,658	£8,785	37	£396,766	£10,723	£-24,892	-11	£1,939	-6%
John O'gaunt School	Secondary	463	£3,254,136	£7,028	448	£3,419,838	£7,634	£165,703	-15	£605	5%
John Rankin Infant and Nursery School	Primary	220	£1,128,644	£5,130	228	£1,285,671	£5,639	£157,027	8	£509	14%
John Rankin Junior School	Primary	358	£1,679,949	£4,693	348	£1,778,371	£5,110	£98,422	-10	£418	6%
Kennet School	Secondary	1522	£9,831,511	£6,460	1485	£10,360,010	£6,976	£528,499	-37	£517	5%
Kennet Valley Primary School	Primary	194	£1,030,986	£5,314	199	£1,139,209	£5,725	£108,224	5	£410	10%
Knitbury St Mary's C.E. Primary School	Primary	130	£760,292	£5,848	122	£801,300	£6,568	£41,008	-8	£720	5%
Lambourn CofE Primary School	Primary	149	£848,947	£5,698	136	£862,844	£6,344	£13,896	-13	£647	2%
Little Heath School	Secondary	1312	£8,460,100	£6,448	1313	£9,110,475	£6,939	£650,375	1	£490	8%
Long Lane Primary School	Primary	209	£1,059,026	£5,067	207	£1,138,402	£5,500	£79,376	-2	£432	7%
Mortimer St John's C.E. Infant School	Primary	176	£885,448	£5,031	165	£899,840	£5,454	£14,392	-11	£423	2%
Mortimer St Mary's C.E. Junior School	Primary	243	£1,145,899	£4,716	235	£1,192,140	£5,073	£46,241	-8	£357	4%
Mrs Bland's Infant School	Primary	148	£861,122	£5,818	126	£814,444	£6,464	£-46,678	-22	£645	-5%
Pangbourne Primary School	Primary	164	£883,993	£5,390	136	£829,340	£6,098	£-54,653	-28	£708	-6%
Park House School	Secondary	912	£5,857,925	£6,423	892	£6,157,384	£6,903	£299,458	-20	£480	5%
Parsons Down Infant School	Primary	90	£548,861	£6,098	90	£590,020	£6,556	£41,159	0	£457	7%
Parsons Down Junior School	Primary	184	£976,161	£5,305	167	£982,359	£5,882	£6,198	-17	£577	1%
Purley CofE Primary School	Primary	93	£565,863	£6,085	81	£555,447	£6,857	£-10,416	-12	£773	-2%
Robert Sandilands Primary School and Nursery	Primary	213	£1,115,313	£5,236	211	£1,213,885	£5,753	£98,571	-2	£517	9%
Shaw-cum-Donnington C.E. Primary School	Primary	95	£587,512	£6,184	91	£621,327	£6,828	£33,815	-4	£643	6%
Shefford C.E. Primary School	Primary	52	£417,400	£8,027	52	£448,987	£8,634	£31,587	0	£607	8%
Speenhamland School	Primary	286	£1,462,786	£5,115	292	£1,645,894	£5,637	£183,108	6	£522	13%
Springfield Primary School	Primary	304	£1,643,122	£4,813	300	£1,546,715	£5,156	£83,593	-4	£343	6%
Spurcroft Primary School	Primary	382	£1,841,150	£4,820	368	£1,931,339	£5,248	£90,189	-14	£428	5%
St Bartholomew's School	Secondary	1354	£8,395,759	£6,201	1352	£9,171,355	£6,784	£775,596	-2	£583	9%
St Finian's Catholic Primary School	Primary	201	£960,767	£4,780	203	£1,048,703	£5,166	£87,827	2	£386	9%
St John the Evangelist C.E. Nursery and Infant Sch	Primary	179	£936,656	£5,233	171	£969,211	£5,668	£32,555	-8	£435	3%
St Joseph's Catholic Primary School	Primary	213	£1,106,255	£5,194	213	£1,178,766	£5,534	£72,511	0	£340	7%
St Nicolas C.E. Junior School	Primary	258	£1,235,423	£4,788	255	£1,352,567	£5,304	£117,143	-3	£516	9%
St Paul's Catholic Primary School	Primary	298	£1,416,337	£4,753	296	£1,517,537	£5,127	£101,199	-2	£374	7%
Stockcross C.E. School	Primary	73	£499,252	£6,839	80	£562,388	£7,030	£63,136	7	£191	13%
Streathley C.E. Voluntary Controlled School	Primary	99	£562,495	£5,682	98	£599,309	£6,115	£36,814	-1	£434	7%
Sulhamstead and Ufton Nervet School	Primary	99	£584,194	£5,901	99	£636,949	£6,434	£52,755	0	£533	9%
Thatcham Park CofE Primary	Primary	320	£1,581,182	£4,941	318	£1,700,967	£5,349	£119,785	-2	£408	8%
The Downs School	Secondary	1046	£6,404,391	£6,123	1045	£6,940,945	£6,642	£536,554	-1	£519	8%
The Ilsleys Primary School	Primary	53	£414,979	£7,830	49	£431,191	£8,800	£16,213	-4	£970	4%
The Willink School	Secondary	1016	£6,550,610	£6,447	1031	£7,176,092	£6,960	£625,482	15	£513	10%
The Willows Primary School	Primary	349	£1,895,491	£5,431	339	£2,002,143	£5,906	£106,651	-10	£475	6%
The Winchcombe School	Primary	425	£2,085,649	£4,907	414	£2,197,265	£5,307	£111,616	-11	£400	5%
Theale C.E. Primary School	Primary	314	£1,522,849	£4,850	308	£1,637,882	£5,318	£115,033	-6	£468	8%
Theale Green School	Secondary	699	£4,658,693	£6,665	725	£5,229,368	£7,213	£570,674	26	£548	12%
Trinity School	Secondary	1145	£7,538,958	£6,584	1188	£8,480,989	£7,139	£942,031	43	£555	12%
Welford and Wickham C.E. Primary School	Primary	66	£489,494	£7,417	62	£505,097	£8,147	£15,602	-4	£730	3%
Westwood Farm Infant School	Primary	186	£952,740	£5,122	178	£1,000,881	£5,623	£48,140	-8	£501	5%
Westwood Farm Junior School	Primary	238	£1,183,972	£4,975	239	£1,277,745	£5,346	£93,773	1	£372	8%
Whitelands Park Primary School	Primary	392	£1,920,240	£4,899	396	£2,100,151	£5,303	£179,911	4	£405	9%
Woolhampton C.E. Primary School	Primary	100	£599,347	£5,993	102	£656,011	£6,431	£56,664	2	£438	9%
Yattendon C.E. Primary School	Primary	94	£563,900	£5,999	90	£592,307	£6,581	£28,406	-4	£582	5%
Total Formula Funding			£133,683,700			£143,452,283		£9,768,583			
Block transfer			£335,047			£0					
Total allocation			£134,018,747			£143,452,283					
Primary Total			£66,536,312			£70,720,867		£4,184,555	-254		
Secondary Total			£67,147,388			£72,731,416		£5,584,028	2		

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Appendix B

West Berkshire Council Schools Growth Fund Criteria 2026/27

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 2026/27 financial year. This means it will be based on the observed differences between the number on roll in each local authority between the October 2024 and October 2025 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 for 2025/26 was £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. We have yet to receive the 2026/27 values. 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 only if the DSG is in surplus. As WBC are in a deficit position overall, any unallocated growth fund must be allocated to the deficit rather than the school formula. 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 2026 will typically receive growth funding in 2026/27, 2027/28 and 2028/29.

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

	October 2024 Census	October 2025 Census
Reception Pupil Numbers	23	31
Year 1 Pupil Numbers	20	25
Year 2 Pupil Numbers	22	20
Total Pupil Numbers	65	76
Number of Classes run by school	3	3

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

Example 2

	October 2024 Census	October 2025 Census
Reception Pupil Numbers	20	21
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	20
Total Pupil Numbers	59	61
Number of Classes run by school	3	3

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

Example 3

	October 2024 Census	October 2025 Census
Reception Pupil Numbers	20	21
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	20
Total Pupil Numbers	59	61
Number of Classes run by school	2	3

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

Example 4

	October 2024 Census	October 2025 Census
Reception Pupil Numbers	20	30
Year 1 Pupil Numbers	20	20
Year 2 Pupil Numbers	19	21
Total Pupil Numbers	59	71
Number of Classes run by school	2	3

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

Appendix C

West Berkshire Council Schools

Additional High Needs Fund Criteria 2026/27

1. Background

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

2. Methodology and Process

- 2.1 There will be an additional payment to schools where the actual number of pre 16 high needs pupils (i.e. pupils in mainstream receiving top ups) is significantly (1%) above the average of all schools in West Berkshire.
- 2.2 Where the actual number of pre 16 high needs pupils per school is 1% above the West Berkshire average (the average will be calculated using the number of high needs pupils in January 2026 and shown in the pink column on the attachment), each additional high needs pupil will attract £6,000 in addition to the top up. The number of additional pupils will be calculated on a proportionate basis rather than rounding up or down to whole pupil numbers to avoid a funding cliff-edge.
- 2.3 The funding will be paid pro rata each term based on the actual number of pre 16 pupils receiving top ups at that time for the number of days in that term i.e. calculated and paid in April, October and January.
- 2.4 The attached table shows for each school how many high needs pupils equals the average + 1% (the pink column) before qualifying for additional funding in 2026/27. Schools will receive £6,000 per 1.0 high needs pupils they have on roll *above this average number*. Note that funding may be a proportion of £6,000 if the calculation is less than 1.0. The table below shows data from 2025/26, this will be updated with 2026/27 when available.
- 2.5 The amount of funding to be set aside for this purpose in the high needs budget will be £272,000.

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

Cost Centre	SCHOOL	Relevant Data			Indicative Funding		
		Total Pre 16 Pupil No.s (Oct 2024 Census) less RU Pupils	Mainstream Pre 16 Pupil No.s Receiving Top Ups September 2025	Notional SEN Budget 2025/26	Average No. of Pupils Formula Funded	High Needs Pupils Above Average (unrounded)	Indicative Add'l Funding
	Primary				3.93%	1% above LA avg	
	Secondary				3.27%	1% above LA avg	£6,000
91000	Aldermaston C.E. Primary School	116	5	51,606	4.56	0.44	2,635
91100	Basildon C.E. Primary School	156	0	46,601	6.13	0.00	0
91300	Beedon C.E. (Controlled) Primary School	22	3	15,978	0.86	2.14	12,810
91400	Beenham Primary School	45	5	23,291	1.77	3.23	19,384
91200	Birch Copse Primary School	417	6	101,334	16.40	0.00	0
91500	Bradfield C.E. Primary School	150	4	46,924	5.90	0.00	0
91600	Brightwalton C.E. Aided Primary School	87	0	25,718	3.42	0.00	0
91700	Brimpton C.E. Primary School	47	0	24,071	1.85	0.00	0
91800	Bucklebury C.E. Primary School	113	2	40,856	4.44	0.00	0
91900	Burghfield St Mary's C.E. Primary School	207	6	82,588	8.14	0.00	0
92000	Calcot Infant School and Nursery	170	6	79,756	6.68	0.00	0
92100	Calcot Junior School	261	10	97,280	10.26	0.00	0
95222	Chaddleworth St Andrew's C.E. Primary School	26	1	10,341	1.02	0.00	0
92400	Chieveley Primary School	171	4	52,184	6.72	0.00	0
95900	Cold Ash St Mark's C.E. School	203	4	51,568	7.98	0.00	0
92200	Compton C.E. Primary School	166	3	60,214	6.53	0.00	0
92300	Curridge Primary School	96	5	30,056	3.77	1.23	7,353
92500	Downsway Primary School	212	11	73,148	8.34	2.66	15,988
92800	Enborne C.E. Primary School	81	1	14,770	3.18	0.00	0
92900	Englefield C.E. Primary School	110	2	19,770	4.32	0.00	0
93000	Falkland Primary School	411	8	137,268	16.16	0.00	0
93100	Fir Tree Primary School and Nursery	211	4	91,701	8.30	0.00	0
93200	Francis Baily Primary School	531	14	254,233	20.88	0.00	0
93400	Garland Junior School	185	6	57,304	7.27	0.00	0
93500	Hampstead Norreys C.E. Primary School	49	1	17,024	1.93	0.00	0
93600	Hermitage Primary School	172	7	43,150	6.76	0.24	1,424
	Highwood Copse Primary School	138	3	19,024	5.41	0.00	0
93700	Hungerford Primary School	328	13	182,060	12.90	0.10	622
92700	The Ilsleys Primary School	49	1	11,430	1.93	0.00	0
93800	Inkpen Primary School	37	5	21,146	1.45	3.55	21,271
93922	John Rankin Infant and Nursery School	228	13	155,777	8.96	4.04	24,213
94000	John Rankin Junior School	348	4	125,812	13.68	0.00	0
94100	Kennet Valley Primary School	199	15	84,000	7.82	7.18	43,054
94200	Kintbury St Mary's C.E. Primary School	122	9	59,224	4.80	4.20	25,219
94300	Lambourn CofE Primary School	136	4	68,352	5.35	0.00	0
94400	Long Lane Primary School	207	4	105,243	8.14	0.00	0
97522	Mortimer St John's C.E. Infant School	165	3	48,078	6.49	0.00	0
97522	Mortimer St Mary's C.E. Junior School	235	10	62,831	9.24	0.76	4,562
94500	Mrs Bland's Infant School	126	7	37,922	4.95	2.05	12,276
94600	Pangbourne Primary School	136	3	53,364	5.35	0.00	0
94822	Parsons Down Partnership	257	9	111,975	10.10	0.00	0
94900	Purley CofE Primary School	81	4	40,280	3.18	0.82	4,891
95000	Robert Sandilands Primary School and Nursery	211	7	74,607	8.30	0.00	0
95100	Shaw-cum-Donnington C.E. Primary School	91	0	52,866	3.58	0.00	0
95200	Shefford C.E. Primary School	52	2	15,951	2.04	0.00	0
95300	Speenhamland School	292	10	136,868	11.48	0.00	0
95400	Springfield Primary School	300	7	101,919	11.80	0.00	0
95500	Spurcroft Primary School	368	11	142,593	14.47	0.00	0
95700	St Finian's Catholic Primary School	203	8	69,600	7.98	0.02	111
97700	St John the Evangelist C.E. Nursery and Infant Sch	171	3	58,925	6.72	0.00	0
97800	St Joseph's Catholic Primary School	213	7	84,192	8.37	0.00	0
96200	St Nicolas C.E. Junior School	255	7	81,240	10.03	0.00	0
96100	St Paul's Catholic Primary School	296	2	108,943	11.64	0.00	0
96322	Stockcross C.E. School	80	2	18,165	3.15	0.00	0
96400	Streatley C.E. Voluntary Controlled School	98	0	25,573	3.85	0.00	0
96500	Sulhamstead and Upton Nervet School	99	3	47,946	3.89	0.00	0
99700	Thatcham Park CofE Primary	318	11	92,728	12.50	0.00	0
96600	Theale C.E. Primary School	308	9	70,572	12.11	0.00	0
96322	Welford and Wickham C.E. Primary School	62	2	18,872	2.44	0.00	0
96800	Westwood Farm Infant School	178	1	63,523	7.00	0.00	0
96900	Westwood Farm Junior School	239	6	76,756	9.40	0.00	0
97000	Whitelands Park Primary School	396	9	187,350	15.57	0.00	0
98700	The Willows Primary School	339	9	182,731	13.33	0.00	0
99400	The Winchcombe School	414	14	191,340	16.28	0.00	0
97300	Woolhampton C.E. Primary School	102	5	37,930	4.01	0.99	5,937
97400	Yattendon C.E. Primary School	90	3	26,490	3.54	0.00	0
98900	Denefield School	963	13	409,296	31.49	0.00	0
98800	The Downs School	1,045	24	359,218	34.17	0.00	0
99000	John O'gaunt School	448	19	277,274	14.65	4.35	26,111
99100	Kennet School	1,485	36	729,271	48.55	0.00	0
99200	Little Heath School	1,313	8	471,318	42.93	0.00	0
99300	Park House School	892	12	343,376	29.17	0.00	0
99800	St Bartholomew's School	1,352	33	517,511	44.21	0.00	0
99500	Theale Green School	725	18	305,569	23.71	0.00	0
99900	Trinity School	1,188	33	622,721	38.84	0.00	0
99600	The Willink School	1,031	41	389,543	33.71	7.29	43,738
	PRIMARY TOTAL	12,382	363		487	34	201,751
	SECONDARY TOTAL	10,442	237		341	12	69,849
	TOTAL ALL SCHOOLS	22,824	600		828	45	271,599

Vulnerable Children's Grant 2024-2025

Report being considered by: Schools' Forum on 13th October 2025

Report Author: Vanessa Grizzle (Interim Principal Educational Psychologist/SEMH Service Manager)

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

1. Purpose of the Report

- 1.1 The purpose of this report is to provide an update on the use of the Vulnerable Children's Grant (VCG) Fund 2024/2025 and the next steps for the application of Early Intervention Support Funding for West Berkshire schools.

2. Recommendation

- 2.1 That Forum Members note the report.

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

Yes: ☐

No: ☒

Consultation and Engagement:

Consultation with West Berkshire Mainstream Funding Review Working Group (re: changes to funding approach)

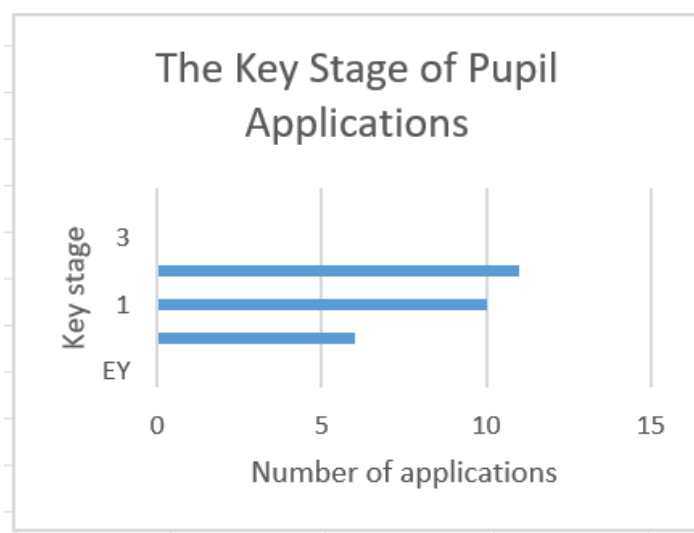
Engagement session at SENCo Update to explain change of funding arrangements and respond to queries.

3. Introduction/Background

- 3.1 The Vulnerable Children's Grant (VCG) is a fund for schools who have unexpected additional financial pressures due to in-year admissions of children with Special Educational Needs and disabilities (SEND) or for children whose needs suddenly change. It is specifically devised to promote social inclusion, reduce exclusions and reduce the pressure on SEN budgets by providing temporary funding.

4. Supporting Information

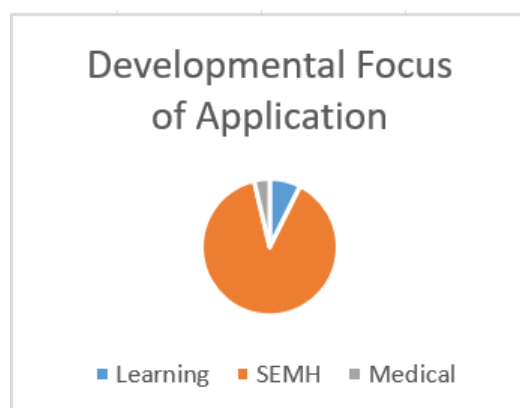
- 4.1 The VCG budget for 2024-2025 was £67,000.
- 4.2 16 settings successfully applied for VCG funding for 27 pupils. Applications were received from primary schools, with most support requested for pupils in key stage 2.



41 applications were made, the majority received were either for support for:

- A dramatic change in pupil need (24) or recent admission (10)

Of the applications accepted, most were to support a pupil's Social Emotional and Mental Health (SEMH) needs, with the remaining 14% requiring learning or support related to their medical needs.



Most applications (88%) requested money for Teaching Assistant (TA) support. When schools were surveyed in July 2025, responses indicated that the TA support was predominantly used to support a pupil's SEMH needs:

- Continuation of 1:1 EHA sessions.
- To follow a low-threat curriculum outside of the classroom alongside the continuation of iCollege placement
- Supporting with transition back into school on a bespoke timetable following a period of medical absence.
- Build relationships and work on compliancy.

- Settling into a new setting.
- Support to implement now / next strategies and use visual prompts.
- Support to follow instructions in the classroom
- Social support at break times and lunch times.
- Modelling appropriate social interactions.
- Support during times of dysregulation to offer consistency and build on strategies to self-manage.
- To help with interventions and a close level of support in morning lessons to enable participation the lessons.
- to provide 1:1 support in an alternative teaching space using the guidance from TTST to help pupil to succeed.
- Supporting pupil in class to access the curriculum, manage social opportunities, ensure good engagement and make expected progress
- Supporting pupil in class to access the curriculum, manage social opportunities, ensure good engagement and make expected progress.

Funding also supported learning needs:

- CALT resources used to help identify gaps in pupil's learning and plan future learning opportunities.
- Support the development of meta cognitive skills to be able to access some learning more independently.
- bespoke timetable and curriculum with 1:1 support in nurture room and outdoors
- to provide 1:1 support in an alternative teaching space using the guidance from TTST to help pupil to succeed.
- support in lessons in the mornings to help pupil to access some learning tasks and have deliver a range of daily interventions.

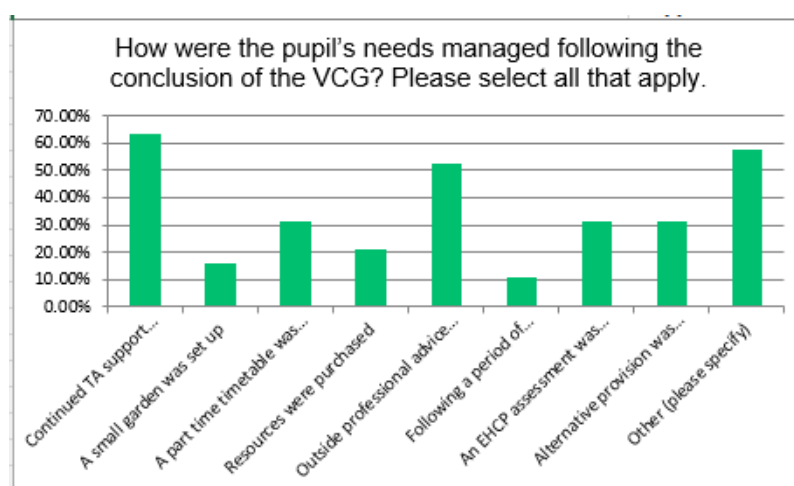
Impact

Settings reported several areas of impact including:

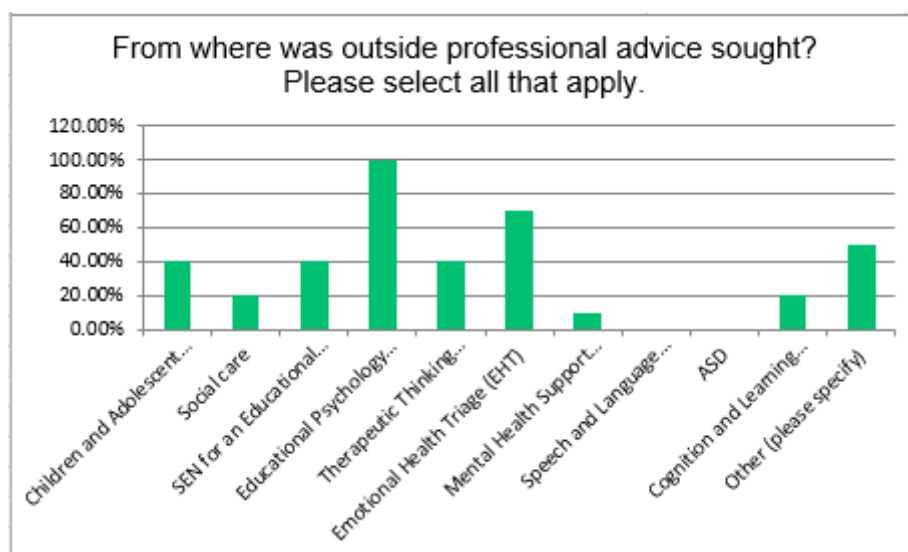
- improved attendance and participation
- promoting a sense of safety
- improved ability to build relationships with staff and students

- development of routines and understanding of expectations
- development of positive interactions and improved self-esteem
- improved emotional regulation
- development of social skills
- more able to access classroom-based learning
- progress with reading, writing and maths
- removed need for an EHCNA or supported evidence for an EHCNA

Although 10% of pupils did not require additional support after the conclusion of the VCG, the vast majority did. Schools often used their own budgets to continue to provide teaching assistant support, as well as supporting in other ways, e.g. organising part time timetables (31%); seeking professional advice (52%); making an EHCNA (31%); putting alternative provision in place (31%).



Of the 10 children for whom professional advice was sought during or following the use of the VCG funding, 100% received support from the Educational Psychology Service, 70% from the Emotional Health Triage, 40% from the Therapeutic Thinking Support Team, from CAMHS and for an EHCP assessment. 20% were referred to Social Care and the Cognition and Learning Teams. iCollege was also requested for some children.



Schools were clear that the VCG is an effective use of funds. Approximately 90% of pupils were said to have made 'a lot' or 'some' progress since receiving funding, indicating that:

- Interactions are more positive.
- He has made significant progress in his learning.
- He is now able to articulate a simple sentence and copy it neatly. He is very keen to be part of the rest of the class and do what they are doing. In the afternoons, once he has finished the task set for him, he will often challenge himself to go further and write a sentence independently.
- There is still a lot of gaps to be closed but the funding has really helped to engage K in his learning and make those first key steps as a writer and to be able to access some of the curriculum with support and independently.
- There has also been significant progress in his behaviour and social skills. When he started, he would often sit under the desk, spin around repeatedly or make humming noises. He would protest when asked to engage in lessons and would refuse to engage. He is now engaged in most lessons and follows instructions and routines without protest.
- There are still tricky periods for O, specifically around transition times but the implementation of full time 1:1, enabled by the grant, has made a difference for him and has reduced the number of behaviour incidents recorded for him.
- B is usually now in class. He has represented the school in sports and has joined in with the end of year play. He attempted his SATS which was a huge step for him.

- The child is now attending school on a more regular basis, and he is in the classroom full time.

Without the funding, schools indicated that:

- they would have found it difficult to implement risk assessments and interventions.
- Frequency and severity of challenging behaviours would increase and difficulties with social interactions would have escalated
- Suspensions and use of a part-time tables would increase
- Alternative provisions would need to be sourced
- Attendance would have decreased

5. Next Steps

While VCG funding has been accessed by some schools, this has not been consistent across all schools. To increase access to and oversight of funding to all West Berkshire schools, a process of alignment is underway whereby five (HNB/Grant) funding streams will be pooled, referrals centralised and allocated via a single panel of Education Service team managers/officers and a school representative. The combined funds will be:

- Vulnerable Children's Grant
- Therapeutic Thinking Support fund
- Autism Limited Fund
- Virtual School fund
- Emotionally Based School Avoidance (EBSA) Support Fund

This will become the Early Intervention Support Funding (EISF) which will be used to support schools with pupils who do not have an Education, Health and Care Plan (EHCP) but have significant additional needs beyond those that might be expected to be funded from the SEND Notional Budget. This funding is intended to provide short-term additional support to help close the gap for statutory school aged children with needs that exceed what would ordinarily be expected at SEN support.

Children and young people might experience the following challenges:

- Have experienced school moves due to their additional needs that is impacting on learning and progress.
- Be on reduced hours or not attending where additional support is required to extend hours or support attendance, engagement and reintegration.
- Where previous setting has had SENIF funding to support a child and new setting needs continuation to support transition into school short term.
- Experience difficulty in making sufficient progress towards their outcomes due to EBSA (where a detailed plan to support meeting needs is evidenced).
- Have experienced long term medical absence and are returning to school.

- Needs require support beyond quality first teaching and school-based support and intervention, as set out in the Ordinarily Available Provision (OAP) Guidance (*in production*) but may not need an Education Health and Care Assessment at this time.
- Have had experienced an unexpected or sudden change that significantly impacts their learning and behavioural presentation, but with appropriate intervention, can close the gap.
- Have a medical condition that affects their learning and is creating a gap that can be closed with additional support that is above OAP.
- A risk assessment which evidences danger to self and others and school requires additional support to prevent suspension or permanent exclusion.

Coordinated funding and a single referral route will enable more comprehensive support and facilitate better partnership working, creating a more cohesive support system. Consolidating resources will also improve efficiency by reducing administration and duplication.

Funding and service support will be accessed via a single form to allow more flexible decision making around appropriate support. Alongside other internal process changes e.g. wider use of management information systems, teams will have broader awareness of the support provided to children and young people known to other teams and can mobilise more quickly.

Information including application guidance documents and form will be circulated to all schools before October half-term.

6. Conclusion

- 6.1 The VCG aims to be equitable and simple to request. Feedback from schools who have accessed it, indicate that it is valued and has significant impact. Access to Early Intervention Support Funding aims to increase inclusion, prevent movement between schools, reduce pressure on school funding and on the capacity of specialist support services, by empowering schools to make provision for pupils in need of additional support above Ordinarily Available Provision.
- 6.2 Changes underway will further improve access, fairness and transparency across funding streams.

7. Appendices

None

Agenda Item 9

Education Services

Service Director : Neil Goddard

	2025/26 Budget	Previous quarter forecast outturn	Q1 Forecast Outturn	Variance		2024/25 Budget	2024/25 Outturn	Variance
	£	£	£	£		£	£	£
Home to School Transport	5,440,470	N/A	5,317,160	(123,310)		4,122,900	5,027,822	904,922
Disabled Children Budgets	68,430	N/A	69,310	880		4,712,650	6,038,189	1,325,539
Mental Health & Behaviour Support Services	921,890	N/A	889,210	(32,680)		781,250	614,568	(166,682)
School Improvement & SEN services	1,759,740	N/A	1,812,730	52,990		1,597,160	1,609,903	12,743
Early Years Provision	511,860	N/A	508,520	(3,340)		440,330	386,399	(53,931)
Management & Strategy	359,480	N/A	552,930	193,450		207,820	519,296	311,476
Trading services	(206,310)	N/A	(6,590)	199,720		(208,830)	(174,905)	33,925
Total	8,855,560	0	9,143,270	287,710		11,653,280	14,021,272	2,367,992

variances are shown as (underspend) / overspend

Variances / Pressures in 2025/26

Underspends in the areas of Home to School Transport and Mental Health Services are more than offset by pressures relating to trading targets and historically agreed savings targets that have, to date, proved unachievable. Trading targets for the Educational Psychology services are not being delivered due to significant and ongoing staffing shortages. Despite repeated attempts to recruit, the service remains under resourced and statutory work is having to be delivered, in part, through the use of Locums, at increased cost. A historic income target for Education Welfare remains as part of the overall budget, but cannot be achieved due to changes in legislation around the role and duties of the Local Authority. Historic savings targets are included against the EHCP budget and Management and Strategy areas, which are not achievable. The EHCP team is under significant pressure due to the increased needs being identified, and the lack of resource to complete the statutory Annual Review process. Further savings are included based on staffing and other efficiencies which are dependent on holding further vacancies and a planned restructure of the service.

Planned mitigations / additional savings

Vacancies have been held across the service to mitigate wider budget pressures. A review of trading services with schools has been commissioned corporately to maximise income and improve service delivery.

Total	Red	Amber	Yellow	Green
72	0	72	0	0
%	0%	100%	0%	0%

For full detail on all savings, please see the appendix in this report which details all directorates

Progress on planned savings already budgeted

As set out above, historic budget savings have not been achieved due to statutory and service pressures. Reduction in training expenditure is being delivered as planned.

Risks not included in the forecast

Additional data to support forecast

Lack of resource to complete statutory function and the impact of key strategic vacancies are creating increased risk for the service. The planned restructure is delayed due to the budget and service pressures that have not yet been mitigated.

Pay award - currently budgeted at 2.5%, the current proposed increase is 3.2% which would be a £30k pressure.

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Dedicated Schools Grant Monitoring Report 2025/26 – Quarter Two

Report being considered by: Schools Forum on 13th October 2025

Report Author: Lisa Potts

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

1. Purpose of the Report

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

2. Recommendation

- 2.1 1.1 That the report be noted.

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

Yes: ☐

No: ☒

3. Implications and Impact Assessment

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

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

4. Introduction/Background

- 4.1 The Dedicated Schools Grant (DSG) is a ring fenced specific grant which can only be spent on school/pupil activity as set out in The School and Early Years Finance (England) Regulations 2025. The Local Authority and Schools' Forum are responsible for ensuring that the DSG is deployed correctly according to the Regulations. Monitoring of spend against the grant needs to take place regularly to enable decision making on over spends/under spends and to inform future year budget requirements.
- 4.2 There are four DSG funding blocks: Schools Block, High Needs Block, Early Years Block and Central Schools Services Block. The funding for each of the four blocks is determined by a national funding formula.

5. Supporting Information

- 5.1 The 2025/26 Dedicated Schools Grant allocation is £203.1m. This includes £64m which funds Academies and post-16 high needs places which is paid direct by the Education and Skills Funding Agency (ESFA) to schools. The DSG budget for 2025/26 has been built utilising the remaining grant.
- 5.2 The Schools block is ring fenced but the Local Authority can transfer up to 0.5% of the funding out of the schools block with Schools Forum agreement. The other blocks are not subject to this limitation on transfers For the 2025/26 budget, no balances were transferred between the blocks.
- 5.3 The DSG expenditure budgets required for 2025/26 total £156.3m, which is £14m more than the funding available. This is due to a rising demand for high needs provision, there is a lack of sufficient maintained SEN places and so more use is having to be made of independent non maintained schools, with significant cost implications. There are also pressures on top up funding allocations. As a result, a £14m in-year efficiency target has been set against the High Needs Block, in order to balance the DSG budget.
- 5.4 There is a brought forward deficit on the DSG of £16.1m.

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

Prior Years			Table 1 - DSG Block forecast 2025/26	2025/26					
2022/23 Outturn	2023/24 Outturn	2024/25 Outturn		Original Budget	Budget Changes	Final Budget	Quarter 1 Forecast	Quarter 2 Forecast	Deficit/ (surplus)
£'000	£'000	£'000		£'000	£'000	£'000	£'000	£'000	£'000
			Expenditure:						
73,090	77,070	77,955	Schools Block (inc ISB)	84,640	(63)	84,577	84,640	84,577	(0)
10,240	11,325	19,878	Early Years Block	27,240	(36)	27,204	27,204	26,895	(309)
967	935	950	Central School Services Block	1,068	0	1,068	1,063	1,094	26
26,456	31,157	36,344	High Needs Block	43,421	(2,176)	41,246	43,044	41,499	253
0	0	0	High Needs Block In-Year deficit recovery	(14,040)	0	(14,040)	0	0	14,040
110,754	120,487	135,127	Total Expenditure	142,329	(2,275)	140,054	155,951	154,065	14,010
			DSG Grant Income:						
(72,937)	(77,005)	(78,106)	Schools Block	(84,640)	63	(84,577)	(84,640)	(84,577)	0
(10,102)	(11,115)	(20,214)	Early Years Block	(27,240)	36	(27,204)	(27,240)	(27,204)	0
(992)	(973)	(951)	Central School Services Block	(1,068)	0	(1,068)	(1,068)	(1,068)	0
(24,983)	(26,892)	(27,750)	High Needs Block	(29,381)	2,176	(27,206)	(29,381)	(27,206)	0
(109,014)	(115,985)	(127,020)	Total DSG Income	(142,329)	2,275	(140,054)	(142,329)	(140,054)	0
(53)			In-year adjustments						
(109,067)	(115,985)	(127,020)	Total Income	(142,329)	2,275	(140,054)	(142,329)	(140,054)	0
			In year net deficit/(surplus):						
153	65	(151)	Schools Block	0	0	0	(0)	(0)	(0)
138	210	(335)	Early Years Block	0	0	0	(37)	(309)	(309)
(25)	(38)	(2)	Central School Services Block	0	0	0	(5)	26	26
1,474	4,265	8,594	High Needs Block	0	0	0	13,663	14,293	14,293
(50)	39		Grant adjustment (re PPG)						
1,689	4,541	8,107	Net In-year Deficit	0	0	0	13,622	14,010	14,010
2,964	4,761	9,450	Deficit Balance in reserves	16,133		16,133	16,133	16,133	16,133
108	148	94	In year reserve movement	0	0	0	57	57	57
0	0	(1,518)	Clawback from Schools	0		0			0
4,761	9,450	16,133	Cumulative Deficit	16,133	0	16,133	29,811	30,200	30,200

- 5.6 The Quarter Two forecast shows an in-year forecast deficit of £14m versus budget, this includes the in-year efficiency target. When added to the cumulative deficit of £16.1m, the forecast year end deficit on the DSG is £30.2m.
- 5.7 With new funding streams in 2025/26 within the Early Years Block it is difficult to forecast accurately. We are allowed to retain 4% of the Early Years Block for centrally managed spend. We are forecasting spend lower than the 4% allowed, which will go towards reducing the deficit on the block.
- 5.8 The High Needs Block is currently showing a £253k overspend at Quarter Two against the budget. We have seen a budget change in relation to the place funding for Brookfields, now that they are an academy the funds are sent direct from the DFE.
- 5.9 The High Needs Block in year deficit recovery target of £14m is a balancing figure between the budget set and the funding received. There is currently no savings being forecast against this. We are seeing increasing costs in the Independent Special Schools Top Ups being offset by reduced costs in the Medical Tuition Service.
- 5.10 The table below shows the forecast position for the end of 2025/26 by block. The surplus balance on the Schools Block of £1m is supporting the forecast overspend position on the other blocks.

Reserve Balances (surplus)/deficit	1.4.2025 Actual	Change in reserves	In-year Deficit/ (Surplus)	31.3.2026 Forecast
Schools Block - growth fund	(729)	0	0	(729)
Schools Block De-delegated	(321)	57	0	(264)
Schools Block - other	(97)	0	0	(97)
Early Years Block	926	0	(309)	617
Central School Services Block	(1)	0	26	26
High Needs Block	17,872	0	14,293	32,165
Clawback from Schools	(1,518)	0	0	(1,518)
Total Deficit Balance	16,133	57	14,010	30,200

6. Conclusion

- 6.1 The total forecast deficit on the DSG amounts to £30.2m, comprising £16.1m from previous years and a further £14m forecast overspend in year. The forecast position will be kept under review and updates provided to Schools' Forum.

7. Appendices

- 7.1 Appendix A – DSG 2025-26 Budget Monitoring Report Month 6

Dedicated School's Grant (DSG) 2025/2026 Budget Monitoring Quarter Two

Cost Centre	Description	Original Budget 2025/26	Net Virements in year	Amended Budget 2025/26	Actual	Variance	Comments
90020	Primary Schools (excluding nursery funding)	60,640,630	-39,540	60,601,090	60,601,090	0	
DSG top slice	Academy Schools Primary	0		0	0	0	
90025	Secondary Schools (excluding 6th form funding)	23,012,980	-23,600	22,989,380	22,989,380	0	
DSG top slice	Academy Schools Secondary	0		0	0	0	
90230	DD - Schools in Financial Difficulty (primary schools)	0		0	0	0	
90113	DD - Trade Union Costs	66,270		66,270	66,270	0	
90255	DD - Support to Ethnic minority & bilingual Learners	170,500		170,500	170,500	0	
90349	DD - Behaviour Support Services	261,330		261,330	261,330	0	
90424	DD - CLEAPSS	3,420		3,420	3,420	0	
90470	DD - School Improvement	310,390		310,390	310,390	0	
90423	DD - Statutory & Regulatory Duties	135,820		135,820	135,820	0	
90235	School Contingency - Growth Fund/Falling Rolls Fund	0		0	0	0	
90054	De-delegated funding from reserves	-56,850		-56,850	-56,854	-4	
	SSR	95,227		95,227	95,227	0	
	Schools Block Total	84,639,717	-63,140	84,576,577	84,576,573	-4	
90583	National Copyright Licences	184,100		184,100	210,960	26,860	
90019	Servicing of Schools Forum	50,590		50,590	50,590	0	
90743	School Admissions	214,210		214,210	214,210	0	
90354	ESG - Education Welfare	214,440		214,440	214,440	0	
90460	ESG - Statutory & Regulatory Duties	313,920		313,920	313,920	0	
90054	Surplus budget to off-set cumulative deficit	470		470	0	-470	
	SSR	90,210		90,210	90,210	0	
	Central School Services Block DSG	1,067,940	0	1,067,940	1,094,330	26,390	
90010	Early Years Funding - Nursery Schools	1,239,660	-34,090	1,205,570	1,205,570	0	
90037	Early Years Funding - Maintained Schools	2,375,750		2,375,750	2,375,750	0	
90036	Early Years Funding - PVI Sector	7,783,440	114,380	7,897,820	7,897,820	0	
90052	Early Years PPG & Deprivation Funding	341,800	15,860	357,660	357,660	0	
90053	Disability Access Fund	107,870		107,870	107,870	0	
90018	2 year old funding	6,371,460	-132,460	6,239,000	6,239,000	0	
90023	Under 2's	8,009,290		8,009,290	8,009,290	0	
90017	Central Expenditure on Children under 5	442,390		442,390	442,390	0	
90287	Pre School Teacher Counselling	77,565		77,565	65,909	-11,656	
90238	Early Years Inclusion Fund	108,000		108,000	108,000	0	
90054	Early Years adjustment re grant funding	297,450		297,450	0	-297,450	
	SSR	85,642		85,642	85,642	0	
	Early Years Block Total	27,240,317	-36,310	27,204,007	26,894,901	-309,106	

Dedicated School's Grant (DSG) 2025/2026 Budget Monitoring Quarter Two

Cost Centre	Description	Original Budget 2025/26	Net Virements in year	Amended Budget 2025/26	Actual	Variance	Comments
90026	Academy Schools RU Top Ups	1,297,350		1,297,350	1,270,000	-27,350	
90539	Special Schools - Top Up Funding	6,601,730		6,601,730	6,480,000	-121,730	
90548	Non WBC Special Schools - Top Up Funding	257,870		257,870	294,350	36,480	
90554	Non WBC free schools	504,750		504,750	761,840	257,090	
90556	SEMH provision at Theale	1,901,700		1,901,700	1,901,700	0	
90557	Kennet Valley Resource Unit	655,840		655,840	655,840	0	
90575	Non LEA Special School (OofA)	1,456,230		1,456,230	1,583,730	127,500	
90579	Independent Special School Place & Top Up	11,425,820		11,425,820	11,884,020	458,200	
90580	Further Education Colleges Top Up	1,726,810		1,726,810	1,472,170	-254,640	
90617	Resourced Units top up Funding maintained	725,120		725,120	675,300	-49,820	
90618	Non WBC Resourced Units - Top Up Funding	43,720		43,720	60,950	17,230	
90621	Mainstream - Top Up Funding maintained	2,039,520		2,039,520	2,039,520	0	
90622	Mainstream - Top Up Funding Academies	1,199,630		1,199,630	1,170,000	-29,630	
90624	Non WBC Mainstream - Top Up Funding	124,980		124,980	150,650	25,670	
90625	Pupil Referral Units - Top Up Funding	1,196,370		1,196,370	1,196,370	0	
90627	Disproportionate No: of HN Pupils NEW	200,000		200,000	200,000	0	
90628	EHCP PRU Placement	1,255,470		1,255,470	1,265,890	10,420	
	High Needs Block: Top Up Funding Total	32,612,910	0	32,612,910	33,062,330	449,420	
90320	Pupil Referral Units	860,000		860,000	860,000	0	
90540	Special Schools	3,410,000	-1,730,000	1,680,000	1,680,000	0	
90546	Special Schools - Place Funding Post 16	790,000	-450,000	340,000	340,000	0	
90551	Mainstream Maintained - post 16 SEN places	48,000		48,000	48,000	0	
90552	Special Schools and PRU Teachers Pay and Pension	334,600		334,600	334,600	0	
90584	Resourced Units - Place Funding	304,000		304,000	304,000	0	
	High Needs Block: Place Funding Total	5,746,600	-2,180,000	3,566,600	3,566,600	0	
90240	Applied Behaviour Analysis	0		0	0	0	
90573	Education Other Than At School (EOTAS)	279,470		279,470	279,470	0	
90574	Spot Purchases - Alternative Provision	376,090		376,090	376,090	0	
90280	Special Needs Support Team	395,110		395,110	349,650	-45,460	
90281	SEND Strategy (DSG)	75,140		75,140	71,370	-3,770	
90282	Medical Home Tuition	403,760		403,760	285,780	-117,980	
90237	High Needs Contingency	289,910		289,910	289,910	0	
90286	Early Years Speech & Language	0		0	0	0	
90287	Pre School Teacher Counselling	151,355		151,355	128,611	-22,744	
90288	Elective Home Education Monitoring	72,360		72,360	56,310	-16,050	

Dedicated School's Grant (DSG) 2025/2026 Budget Monitoring Quarter Two

Cost Centre	Description	Original Budget 2025/26	Net Virements in year	Amended Budget 2025/26	Actual	Variance	Comments
90290	Sensory Impairment	251,220		251,220	288,830	37,610	
90295	Therapy Services	614,680		614,680	614,680	0	
90372	Therapeutic Thinking	76,700		76,700	65,950	-10,750	
90373	Emotional Based School Avoiders (EBSA)	144,520		144,520	144,520	0	
90374	SEMH Practitioner	54,240		54,240	33,800	-20,440	
90356	Fair Access Protocol	0		0	0	0	
90555	LAL funding	183,920		183,920	183,920	0	
90565	Equipment For SEN Pupils	20,000		20,000	20,000	0	
90577	SEN Commissioned Provision	722,340		722,340	734,820	12,480	
90582	PRU Outreach	61,200		61,200	61,200	0	
90585	HN Outreach Special Schools	50,000		50,000	50,000	0	
90610	Hospital Tuition	36,180		36,180	36,180	0	
90830	ASD Teachers	326,130		326,130	321,390	-4,740	
90961	Vulnerable Children	179,400		179,400	179,400	0	
90581	Dingleys Promise	125,000		125,000	125,000	0	
	High Needs Block: Non Top Up or Place Funding	4,888,725	0	4,888,725	4,696,881	-191,844	
90054	Efficiency Target	-14,039,870	4,500	-14,035,370	0	14,035,370	
	SSR	172,921		172,921	172,921	0	
	High Needs Block Total	29,381,286	-2,175,500	27,205,786	41,498,732	14,292,946	
	TOTAL DSG EXPENDITURE	142,329,260	-2,274,950	140,054,310	154,064,536	14,010,226	
90030	DSG Grant Account	-142,329,260	2,274,950	-140,054,310	-140,054,316	-6	
	Net In-year Deficit	0	0	0	14,010,220	14,010,220	
	Deficit Balance brought forward	16,132,638		16,132,638	16,132,638	0	
	In year reserve movement			0	56,854	56,854	Funding from reserves for de-delegations
	Cumulative Deficit	16,132,638	0	16,132,638	30,199,712	14,067,074	

Deficit Schools

Report being considered by:	Schools' Forum		
Date of Meeting:	1 October 2025		
Report Author:	Lisa Potts		
Item for:	Information	By:	All Maintained Schools Representatives

1. Purpose of the Report

- 1.1 This report provides details of the schools in deficit during 2025/26.
- 1.2 The report also provides information on lessons learned from monitoring schools in deficit.

2. Recommendation

- 1.1 That the report be noted.

3. Introduction/Background

- 3.1 Schools are permitted to set a deficit budget if they meet certain conditions. This is termed a licensed deficit. The conditions of a licensed deficit are set out in the Scheme for Financing Schools (the legal contract the Council has with schools) and include the following statement, "The recommended length over which schools may repay the deficit, i.e. reach at least a zero balance, with appropriate mechanism to ensure that the deficit is not simply extended indefinitely, is three years. The maximum length of repayment is five years."
- 3.2 If the conditions of the license are not met by the school, the Council has the power to issue a Notice of Concern, which ultimately could mean removal of a school's delegation.
- 3.3 During the financial year some schools enter an unplanned financial deficit due to circumstances beyond the school's control. For example, higher than budgeted inflationary pay increases, power costs etc., poor Ofsted outcomes that result in unplanned spend. Any school doing so is requested to abide by the conditions of the deficit.

4. Deficit schools update

- 4.1 For 24/25 10 schools had budgeted licence deficits totalling £873,500 plus a further 4 in-year unplanned deficits and the total of the actual 24/25 year-end deficits was £995,793. Please note the below list is for 12 schools as 2 schools with a planned deficit ended the year in surplus
- 4.2 The 2025/26 budget shows 10 schools with licenced deficits (and a further 3 schools that will be submitting deficit budgets although they have been given an extended deadline to 26.09.25), The budgeted deficit for the current 10 licenced deficits totals £945,900.

4.3 The table below shows the budgets for these schools and status of the licence approvals for 2025/26.

Main School Budgets	2024/25 Year end balance	2025/26 Budgeted Outturn	2026/27 Budgeted Outturn	2027/28 Budgeted Outturn	2028/29 Budgeted Outturn	2029/30 Budgeted Outturn	2030/31 Budgeted Outturn	2031/32 Budgeted Outturn	Licensed	Terms for granting licence
Aldermaston CE Primary	(£47,526)	£3,340							N/A	Budgeted to recover in year - robustly checked by SR. Standard P9 monitoring will be carried out.
Brimpton CE Primary <i>*Place Planning have concerns*</i>	(£24,864)	Original budget rejected as did not show deficit recovery							No	Extension has been granted by NG. Deadline to submit 25/26 budget is 26.09.2025
Bucklebury CE Primary	(£3,790)	£2,860							N/A	Budgeted to recover in year - robustly checked by SR. Standard P9 monitoring will be carried out.
Chieveley	£52,760	Original budget rejected as did not show deficit recovery							No	Extension has been granted by NG. Deadline to submit 25/26 budget is 26.09.2025
Enborne CE Primary	(£14,048)	£14,380							N/A	Budgeted to recover in year - robustly checked by SR. Standard P9 monitoring will be carried out.
Hermitage Primary	(£40,499)	(£96,180)	(£60,055)	(£21,113)	£13,262	£28,345			Yes	Budget has been accepted and can be licenced.
Kennet Valley Primary	£1,800	(£25,440)	£52,796	£20,560	£56,342	(£81,323)			Yes	Budget has been accepted and can be licenced for one year only. The new HT (starting Sept 2025) will have input on budget setting going forward.
Pangbourne Primary <i>*Place Planning have concerns*</i>	(£88,050)	(£160,890)	(£183,929)	(£157,605)	(£115,203)	(£76,942)	(£41,271)	£89	Yes	Budget has been accepted and can be licenced for one year only. It is recognised that the revised budget shows a recovery in 2031/32 but the forecast surplus is very low.
Purley	£14,829	(£39,070)	(£64,426)	(£63,987)	(£56,994)	(£48,110)			Yes	Budget has been accepted and can be licenced for one year only.
Spurcroft	(£154,340)	(£134,500)	(£46,340)	£12,165	£49,131	£19,158			Yes	Budget has been accepted and can be licenced.
St Finians RC Primary	(£75,444)	(£40,920)	£3,308	£18,597	(£5,599)	(£62,715)			Yes	Budget has been accepted and can be licenced - school to submit a report regarding returning to deficit in 28/29 and 29/30.
St Josephs	(£182,853)	(£173,330)	(£102,816)	£495	£96,267	£153,263			Yes	Budget has been accepted and can be licenced.
The Burghfield Common Federation (formerly Mrs Blands & Garland Junior)	£13,171	(£206,070)	(£137,037)	(£91,123)	(£47,841)	£274			Yes	Budget has been accepted and can be licenced with caveats - school to submit a report on what more they will do to increase £250 surplus at end of 5 yrs
The Kite Federation <i>*Place Planning have concerns*</i>	(£91,131)	Original budget rejected as did not show deficit recovery							No	Extension has been granted by NG. Deadline to submit 25/26 budget is 26.09.2025
Theale CE Primary	(£234,747)	(£52,550)	£3,391	£61,777	£120,871	£180,469			Yes	Budget has been accepted and can be licenced with caveats.
Woolhampton CE Primary	(£38,500)	(£16,950)	£8,659	£26,963	£21,630	£9,834			Yes	Budget has been accepted and can be licenced.
Total of Deficits	(£995,793)	(£945,900)	(£526,449)	(£193,270)	£131,866	£122,253				

5. Reasons for school deficits

5.1 Falling pupil numbers:

- (1) National trend of falling numbers and no indication that this will reverse.
- (2) Viability of the smallest schools.
- (3) Belief that the school can market its way out of this.
- (4) Aversion to requesting a reduction in PAN.
- (5) Aversion to merging year groups (especially amongst parent governors).

5.2 Additional unfunded high need children:

- (1) Time taken to produce an EHCP and time lag in being awarded funding.
- (2) EHCPs not covering the full cost of support needed.

5.3 Increasing costs:

- (1) Energy.
- (2) Maintenance of buildings.
- (3) Catering – affecting small schools.
- (4) Unfunded support staff pay increases.

5.4 Lower Income:

Post covid income levels and hoping that this will recover to pre-covid levels and not addressing this as a long-term issue. This mostly applies to wrap around care and clubs that are impacted by parents working from home.

6. Reasons for not being able to recover a deficit

6.1 Budgetary control:

- (1) Lack of ownership of budget by Headteacher, Senior Leadership Team (SLT) and Governors.

All budget assumptions should be challenged and owned by the above, and not just left to the School Business Manager or Finance Officer (SBM/FO).

- (2) Poor financial management.

The monitoring of school's finances not being given sufficient time and attention to be reviewed to allow decisions to be made. The information should be timely, accurate and robust, with any variances fully explained.

In-year deficits or overspends not being addressed. Decisions should be made to consider the financial impact over more than just the current financial year.

Budgeting based on last year rather than reviewing what happened last year and using it to inform future forecasting.

Lack of spend control on non-salary items, such as authorising purchases without checking budget position. Failing to prioritise purchases eg no option items such as energy, insurance, necessities and nice to haves.

- (3) Staffing decisions.

Staff members should not automatically be replaced on a like for like basis. Consideration should be given to the needs of the school and the affordability of the replacement.

Appointment of additional staff should be referred to governors as this is a change from the budgeted agreed structure. Impact on future years should be considered.

Possible overuse of timesheets and overtime claims. Lack of payroll reconciliations or not investigating or resolving differences.

Recruitment and retention concerns. Disproportionate number of teachers on UPR. Retention is good but expensive.

Uninsured staff absences.

(4) SBM/FO

Insufficient hours to perform the role.

Lack of experience or financial background.

Expectation to cover admin tasks.

Tend to be cautious, overestimating expenditure and underestimating income, resulting in surpluses against budget, but masking deficit warnings.

6.2 Decision making:

(1) Not agreeing the budget in a timely manner.

This should ideally be before the financial year begins, the date is known and the school should be able to plan to meet this deadline. We are still in the process of getting budgets agreed with deficit schools in November.

The LA issues budget shares by the end of March but does provide advance forecast figures, so this should not hold up the budget setting process.

(2) Unwillingness to share possible deficit with WBC at the earliest point in time, take decisive action or explore early options.

(3) Not taking advice from HR on staffing options.

(4) Slowness to act on the deficit.

6.3 Funding uncertainty:

Late notification, not reading the detail provided.

7. Good practice learned from schools that do recover their deficit

7.1 Strong budgetary control:

(1) Full ownership of budget by Headteacher, Senior Leadership Team (SLT) and Governors.

(2) Good financial management.

The monitoring of school's finances is given sufficient time and attention to be reviewed to allow decisions to be made. The information is timely, accurate and robust, with any variances fully explained.

Papers circulated in advance of governor meetings and governors should consider submitting questions in advance to allow for a full response to be available at the meeting so discussion can take place.

In-year deficits or overspends addressed as soon as they arise with actions to bring the school back in line with budget.

Reviewing what happened last year and using it to inform future forecasting.

Strong spend control on non-salary items.

(3) Staffing decisions.

Full consideration given to the appointment of additional staff. Impact on future years considered.

Staff members not automatically replaced on a like for like basis. Consideration given to the needs of the school and the affordability in all decisions.

Thinking creatively and speaking to HR. Considering fixed term contracts.

(4) SBM/FO

Strong SBM with accountancy background or qualifications, with enough time to fulfil the accounting requirements.

7.2 Decision making:

(1) Agreeing the budget in a timely manner, ideally before the financial year begins.

(2) Sharing possible deficit with WBC at the earliest point in time, taking decisive action and exploring early options.

Taking advice from HR on staffing options.

Deciding whether to share the financial position with staff to help get ideas to improve efficiency or generate savings. Sharing can result in retirement plans being shared or requests to reduce hours.

(3) Those schools that get ahead can avoid or minimise and recover deficits sooner.

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