SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON MONDAY 1 DECEMBER 2025

Forum Members Present: Catherine Bernie (Academy Special Schools), Councillor Heather Codling (Deputy Leader & Executive Portfolio Holder: Children and Family Services), David Fitter (Academy Schools), Richard Hand (Trade Union), Michelle Harrison (Maintained Primary Schools), Rebecca Hartley (Maintained Primary Schools), Keith Harvey (Maintained Primary Schools), Jon Hewitt (Maintained Special Schools), Steve Lewis (Academy Schools), Gary Norman (Academy Schools), Chris Prosser (Maintained Secondary Schools), Graham Spellman (Roman Catholic Diocese), Phil Spray (Maintained Primary Schools), Chloe Summerville (Maintained Nursery Schools) and Edwin Towill (Academy Schools)

Also Present: Neil Goddard (Service Director - Education and SEND), Claire Denner (Senior Accountant), Vanessa Grizzle (Interim Principal Educational Psychologist), Lisa Potts (Finance Manager), Jessica Bailiss (Democratic Services Officer), Hine Thompson (Senior Finance Business Partner) and Sadie Owen (Principal Democratic Services Officer).

Apologies for inability to attend the meeting: Jay Armstrong (Maintained Primary Schools), Reverend Mark Bennet (Church of England Diocese), Toby Bradley (Service Lead, Financial Management), Nicolle Browning (Maintained Secondary Schools), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), Mel Godliman (Early Years PVI Settings), Beth Kelly (Head of Early Years), Jo Lagares (Maintained Primary Schools), Julie Lewry (Academy Schools), Jo MacArthur (Maintained Primary Schools) and David Ramsden (Maintained Secondary Schools)

PART I

1 Minutes of previous meeting dated 13th October 2025

The Minutes of the meeting held on 13th October were approved as a true and correct record and signed by the Chair.

2 Actions arising from previous meetings

The Schools' Forum noted the completed action detailed on page seven of the agenda pack.

3 Minutes from the Heads' Funding Group for Information

The Schools' Forum noted the minutes of the last Heads' Funding Group meeting.

4 Declarations of Interest

There were no declarations of interest received.

5 Membership

There were no membership updates.

6 Heads' Funding Group Terms of Reference (Neil Goddard)

Neil Goddard presented the report (Agenda Item 7), which sought approval from the Schools' Forum for the revised Terms of Reference (ToR) for the Heads' Funding Group (HFG).

Neil Goddard explained that the revised ToR were the outcome of work undertaken by the Schools' Forum task group, which reviewed the governance arrangements for the Schools' Forum and the HFG. He highlighted that the HFG would now be established as a formal subgroup of the Forum, rather than operating informally. Minutes of HFG meetings would be circulated as part of the Forum agenda, and reports would include a section summarising HFG comments.

Neil Goddard outlined that HFG meetings would be scheduled further in advance of Forum meetings to allow time for reports to be updated following HFG feedback. He confirmed that the HFG would continue to play a key role in governance and that the chairing arrangements would remain within his role. The ToR would be kept under review for future meetings.

The Chair noted that there were no comments and therefore invited the Schools' Forum to consider the recommendation to approve the revised ToR for the HFG. A proposal to approve the ToR was seconded and at the vote the motion was carried.

RESOLVED that the revised HFG ToR were approved.

7 School Funding Formula 2026/27 (Lisa Potts)

Lisa Potts introduced the report (Agenda Item 8), which set out the results of the consultation with all schools on the proposed primary and secondary school funding formula for 2026/27.

Lisa Potts explained that the consultation had been issued to schools in late October and early November regarding the allocation of the schools funding formula for 2026/27. She outlined that five questions had been posed, with responses summarised in the report. There were 20 responses overall, with fewer responses on question five as it applied only to maintained schools. Lisa Potts highlighted the recommendations within the report under section 2.1 and the recommendations from the HFG set out in section 2.2.

The Chair invited the Forum to consider recommendations 2.1 (a) and (b) as set out below noting that, as set out in section 2.2, the HFG agreed with both of these recommendations. No questions were raised.

a) To mirror the Department for Education's (DfE) 2026/27 National Funding Formula (NFF) to calculate the funding allocations.
b) To address any surplus or shortfall in funding by adjusting the AWPU values.

The recommendations were proposed and seconded and at the vote with School Members, the motion was approved.

The Chair moved on and asked the Forum to consider recommendation 2.1 (c).

c) To consider whether to apply a top slice to the schools funding to support the HNB and at what percentage.

Neil Goddard clarified that any recommendation from the Schools' Forum would go forward as part of the Local Authority's (LA's) budget setting process. He stated that it had not been set out in the report what any agreed transfer would fund, due to the scale of the deficit in the High Needs Block (HNB). The transfer would help reduce the overall deficit, which was projected to increase significantly. He explained that the anticipated overspend for the next year was around £17m, on top of £30m for the current year.

Lisa Potts added that the current overspend was costing the LA approximately £900k in interest payments. Councillor Heather Codling reported that, if the Forum voted to not transfer any funding, no decision had yet been taken as to whether this would be appealed by the LA and this would be a political decision. Councillor Codling noted the Government's scrutiny of financial decisions and stated that West Berkshire LA was likely

to have to seek further financial support next year, as it had in the current year. Councillor Codling stated that it was likely it would be queried why support had not been sought from schools for the HNB.

The Chair noted the HFG recommendation supporting no transfer and invited comments from the Forum.

Keith Harvey asked what effect a 0.5% transfer would have on interest payments. Lisa responded that a 0.5% transfer would equate to a transfer of around £700k and said she would need to check with Treasury colleagues to confirm the impact on interest payments.

Jon Hewitt stated that he was against a transfer. He believed the transfer would have little impact compared to the size of the deficit. He stressed that the Government needed to take action in sorting what was a national issue.

Chris Prosser concurred with Jon Hewitt and was concerned that transferring money from schools would go against the SEND Strategy. The aim was to try and keep more SEN children in mainstream schools and taking money away from schools would be counterintuitive.

The Chair noted that the majority were against a transfer of funding including the HFG. **A recommendation for a 0% transfer was proposed and seconded and at the vote with school members, the motion was carried.**

The Chair invited the Forum to consider recommendation 2.1 (d) noting that the HFG had agreed with the recommendation.

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

David Fitter appreciated the detail added by Lisa Potts on high needs additional funding for disproportionate numbers however, he raised a concern that using only West Berkshire Education, Health and Care Plan (EHCP) numbers for allocation, negatively impacted schools that had significant numbers of EHCP students from outside the West Berkshire area.

Neil Goddard agreed with the points raised by David Fitter and acknowledged that the data should reflect all EHCPs, not just those from West Berkshire. He explained that the limitation was due to data reliability issues but committed to reviewing the approach and reporting back at the next meeting. Neil Goddard clarified that the principle of the criteria was being voted on, and any improvements to the data would be considered subsequently.

Recommendation (d) was proposed and seconded and at the vote with all Forum members, the motion was carried.

RESOLVED that:

- The approach to how data was collected regarding EHCPs would be reviewed and reported on at the next meeting.
- Recommendations (a), (b), (c) and (d), as outlined above, were approved by the Schools' Forum.
- Recommendation (e) was considered as part of the next agenda item.

8 Draft De-delegations 2026/27 (Lisa Potts)

Lisa Potts introduced the report (Agenda Item 9), which set out the details, cost and charges to schools of the services on which maintained schools' representatives were required to vote on an annual basis. It was highlighted that ethnic minority and traveller achievement services (EMTAS) would be delivered differently for 2026/27 and that the

school improvement function would now be funded from the LA's revenue budget rather than through de-delegation.

Lisa Potts highlighted that while overall service costs had increased slightly in line with inflation, some per-pupil rates might rise because of expected academy conversions, reducing the number of pupils over which costs were spread. Final figures would be confirmed after the October 2025 census.

Keith Harvey enquired about the status of EMTAS. Neil Goddard firstly explained that the school improvement function would now be funded from the LA's revenue budget as the service was taking on more of a strategic role as more schools converted to academies. Neil Goddard confirmed that EMTAS functions would be delivered differently. He confirmed that Gypsy Roma Traveller services would move to family hubs to provide broader support beyond schools, and that English as Additional Language (EAL) support would be absorbed into the school improvement service. Keith Harvey asked whether this change would increase costs for schools with a high number of EAL pupils. Neil Goddard responded that because money was not being deducted for school improvement services, there should be more money in schools to purchase these services however, the basic level of service previously offered would continue.

The Chair drew attention to the recommendations under section two of the report, noting that recommendation 2.1 proposed de-delegation of the Promoting Inclusive Practise Service (PIPS) be voted on separately. He sought consideration of recommendation 2.2 and 2.3 and suggested a vote being taken on these items together:

2.2 Maintained primary, secondary, special, nursery and PRU heads to agree the De-delegations and Education Functions as set out under 4.5 of the report.

2.3 Maintained primary, secondary, special, nursery and PRU heads to agree the Health and Safety Service as set out in Table 5 of the report.

The recommendations above were proposed and seconded and at the vote with all maintained schools, the motion was approved.

RESOLVED that recommendations 2.2 and 2.3 were approved by the Schools' Forum. It was noted that PIPs would be considered as part of the next agenda item.

9 Promoting Inclusive Practice Service Report (Formerly Therapeutic Thinking) (Vanessa Grizzle)

Vanessa Grizzle introduced the report (Agenda Item 10), which provided an outline of the Promoting Inclusive Practice Service (PIPS) (formerly Therapeutic Thinking Support Team) offer, for consideration by the Schools' Forum to maintain de-delegation funding.

Vanessa Grizzle explained that the service provided trauma-informed, relational therapeutic support for pupils with SEMH needs, aiming to improve attendance, reduce exclusions, and enhance staff confidence. Vanessa summarised evidence from the 2024–25 school survey, which showed positive impacts on pupil well-being and staff classroom management.

It was reported that the HFG had considered four options and recommended continuing the delegated funding for a further year before reviewing progress and considering a traded model. Vanessa Grizzle reported that some concerns had been raised in the past about the service offer and these would be addressed moving forward through providing additional elements including staff well-being sessions, bookable consultations, focus groups with schools, and alignment with other services to improve early identification and transitions. Vanessa Grizzle also confirmed that monitoring would include case studies,

focus groups and impact and analysis data linked to KPIs, with annual updates to the Forum. The full details on this were included in the report.

Vanessa Grizzle reported that staffing costs for 2025/26 would increase by one percent but a surplus carried forward would reduce the de-delegated amount by 33.7%, resulting in a net cost of £206,962 and £17.07 per pupil. It was noted that there was also the potential for income from academies buying back the service. Vanessa Grizzle sought approval of the HFG's recommendation out in the report.

Rebecca Hartley stated that she was in agreement that the service should be de-delegated for a year and then reviewed but expressed concern about recruitment and asked whether schools would receive the expected level of service if recruitment proved difficult. Vanessa Grizzle responded that alignment with other services would help mitigate risks and confirmed that recruitment was progressing well, with key posts filled.

Michelle Harrison asked how costs would be covered if the team increased. Vanessa Grizzle confirmed that there would be no further charging beyond the funded amount and noted potential income from academies buying back the service.

Neil Goddard added reassurance that any unspent funds would remain within the service and highlighted the benefits of the new joined up approach. The HFG had supported the service being de-delegated for a further year. A view would be required at a later stage regarding how the service would be funded beyond this, noting that a traded model would be reconsidered in the future.

The Chair invited the Schools' Forum to consider the recommendation to maintain de-delegated funding for PIPS for a further year. The recommendation was proposed and seconded and at the vote the motion was carried.

RESOLVED that

- The recommendation to de-delegate PIPS for a further year was approved.
- The Schools' Forum would review progress and a traded model would be reconsidered in the future.

10 Draft Central Schools Block Budget 2026/27 (Lisa Potts)

Lisa Potts introduced the report (Agenda Item 11), which set out the budget proposal for services funded from the Central Schools Services Block (CSSB) of the Dedicated Schools Grant (DSG).

Lisa Potts explained that historically, indicative allocations from the Department for Education (DfE) were received during the summer, but at the time of writing the report, no figures had been available. An indicative value had since been received, based on the previous year's census data, although the final allocation would not be confirmed until later in December.

Lisa Potts highlighted that the CSSB funded key services such as school admissions, copyright licences, and statutory and regulatory duties, as summarised in Appendix A. Based on the indicative figure, a shortfall of approximately £55k to £60k was forecast against the cost of delivering these services. One of the main pressures on the block was the rising cost of the Capita/MRI system, which continued to increase year on year beyond anticipated levels. Lisa Potts noted that predicting the grant level remained challenging until the October 2025 census data was finalised.

RESOLVED that no questions or comments were raised by the Schools Forum and the report was noted.

11 Early Years Budget 2025/26 - In Year Position (Lisa Potts and Beth Kelly)

Lisa Potts introduced the report (Agenda Item 12), which provided an overview of the current Early Years Block provision. Lisa Potts reported that historically the block had carried a deficit of around £1m for the past four to five years. Although a deficit management plan had been in place, its implementation had been disrupted by COVID-19 and subsequent changes in funding arrangements.

Lisa Potts explained that the early years grant had increased significantly from approximately £10/£12m to £28m due to new entitlement funding streams. However, forecasting remained challenging because of issues with the Capita/MRI system, which had affected the accuracy of hours data. Despite these challenges, Lisa Potts reported positive progress. At the end of 2024/25, the deficit had stood at £928k but adjustments following the final grant reconciliation reduced this by £492k, bringing the revised deficit down to £436,000. She noted that the improvement was largely due to overestimations in previous forecasts for new entitlement hours. It was hoped that the deficit would be cleared in the next year or so.

Neil Goddard added that, as raised by David Ramsden at the Heads Funding Group, there was potential in future years to consider using Early Years block funding to support pressures in the High Needs block. However, Neil stressed that this could only be explored once the Early Years deficit had been fully addressed. He confirmed that this approach would align with broader strategic objectives for SEND and early intervention.

RESOLVED that no questions or comments were raised by the Schools Forum and the report was noted.

12 High Needs Block Budget Proposals 2026/27 (Lisa Potts)

Lisa Potts introduced the report (Agenda Item 13), which set out the current financial position of the high needs budget for 2025/26 and the position as far as it could be predicted for 2026/27, including likely shortfall.

Lisa Potts noted that some figures in section 3.3 of the report contained minor errors, and members were directed to table 4.10 of the report for accurate values. Lisa explained that the forecast for 2025/26 showed a significant overspend and that provisional figures for 2026/27 were based on historical data and anticipated trends in Education, Health and Care Plans (EHCPs).

Lisa highlighted that the estimated Dedicated Schools Grant (DSG) income for 2026/27 was £29.4 million, which appeared lower than the previous year because the 2025/26 allocation had included £2.1 million of place funding for Brookfields School, which had since converted to an academy. This amount had been removed for 2026/27, with inflation applied to the remaining allocation. She confirmed that the forecast deficit for the High Needs Block (HNB) was expected to rise to approximately £17m in 2026/27, compared to £13 million in the current year.

Neil Goddard added that the vast majority of HNB funding continued to flow directly to schools, with only a very small proportion retained for central expenditure. He explained that the newly appointed commissioning team, led by Tony Parker, was expected to deliver savings through improved engagement with the independent and non-maintained sector, although these efficiencies would only flatten the curve of overspend rather than achieve a balanced budget. Neil Goddard also noted that the recent banding review for SEND would result in higher values for the upper bands, and this had been factored into the budget proposals. He confirmed that the new banding arrangements were intended to take effect from the next financial year, subject to agreement.

Neil Goddard emphasised that while actions taken to date were reducing the rate of increase, the scale of the deficit remained a national issue requiring a national solution. He also reminded members that government proposals to assume responsibility for

historic deficits were expected from 2028, but until then, the LA faced ongoing financial pressure, including interest costs on the cumulative deficit.

Michelle Harrison asked when the new banding would come into effect and Neil Goddard confirmed that implementation was planned for the next financial year, with some potential for phased introduction earlier if feasible.

RESOLVED that no further questions were raised by the Schools' Forum, and the report was noted.

13 Education Budget Monitoring Quarter 2 (Neil Goddard/Lisa Potts)

Neil Goddard introduced the report (Agenda Item 14), which presented the LA funded education budget monitoring position for Quarter 2. He explained that this information was provided for context as the Schools' Forum did not have decision-making powers over these budgets. Neil Goddard highlighted that the overall education budget was £8.855 million, with home to school transport accounting for the largest share at £5.44m, well over half of the total. The remaining budget covered statutory services such as educational psychology, school improvement and early years management.

Neil Goddard noted that excluding transport, the available budget for education services was approximately £3 million, which he described as limited. He reported that the LA was projecting an overspend of £287k for the year, although this figure was expected to rise due to ongoing pressures in home to school transport. Neil Goddard emphasised that sharing this information improved transparency and helped the Forum understand the broader financial context in which Forum decisions were made.

RESOLVED that no questions were raised by the Schools' Forum, and the report was noted.

14 Forward Plans

The Chair introduced the item asking members to note the forward plan and upcoming contracts as set out in the meeting papers. He highlighted that the March meeting was likely to be a training session held in person. This followed feedback from the recent Schools' Forum review, where members requested additional training, a reduction in the number of formal meetings and opportunities to meet face to face.

15 Date and Format of the next meeting

The next meeting of the Schools' Forum was scheduled for Monday 19th January 2026 at 5pm on Zoom.

(The meeting commenced at 5.00 pm and closed at 6.12 pm)

CHAIR …….

Date of Signature …….