

Notice of Meeting

Schools Forum

Monday 1 December 2025 at 5.00pm
Virtual Zoom Meeting

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

Date of despatch of Agenda: Tuesday 25 November

For further information about this Agenda, or to inspect any background documents referred to in Part I reports, please contact Jessica Bailiss on (01635) 503124
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Further information and Minutes are also available on the Council's website at
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Agenda - Schools Forum to be held on Monday 1 December 2025 (continued)

Forum Members: Jay Armstrong, Kavash Bamfield, Reverend Mark Bennet, Catherine Bernie, Nicolle Browning, Heather Codling, Iain Cottingham, Jacquie Davies, David Fitter, Mel Godliman, Richard Hand, Michelle Harrison, Rebecca Hartley, Keith Harvey, 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

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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 13 OCTOBER 2025**

Present: Jay Armstrong (Maintained Primary School Governor), Kavash Bamfield (Maintained Primary School Headteacher), Reverend Mark Bennet (Church of England Diocese), Catherine Bernie (Academy Special Schools), Nicolle Browning (Maintained Secondary School Headteacher), Councillor Heather Codling (Deputy Leader & Executive Portfolio Holder: Children and Family Services), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), Paul Davey (Maintained Primary School Governor), Jacque Davies (Pupil Referral Unit Headteacher), Mel Godliman (Early Years PVI Settings), Richard Hand (Trade Union), Michelle Harrison (Maintained Primary Schools), Keith Harvey (Maintained Primary School Headteacher), Jon Hewitt (Maintained Special School Headteacher), Jo Lagares (Maintained Primary School Headteacher), Steve Lewis (Academy School Representative), Julie Lewry (Academy School Headteacher), Jo MacArthur (Maintained Primary School Headteacher), Gary Norman (Academy School Governor), Chris Prosser (Maintained Secondary School Headteacher), Phil Spray (Maintained Primary School Governor), Chloe Summerville (Maintained Nursery School Headteacher) and Charlotte Wilson (Academy School Headteacher)

Also Present: Toby Bradley (Service Lead, Financial Management), Neil Goddard (Service Lead for Education and SEND), Rose Carberry (Principal Adviser for School Improvement) and Jessica Bailiss (Democratic Services Officer)

Apologies for inability to attend the meeting: David Fitter (Academy School Headteacher), David Ramsden (Maintained Secondary School Headteacher), Graham Spellman (Catholic Diocese (Chair) and Edwin Towill (Academy School Headteacher)

(Keith Harvey, Vice-Chair, in the Chair)

PART I

The Vice-Chair noted that it was Rose Carberry's final meeting and thanked her for the work she had done for the Schools' Forum and for West Berkshire generally.

The Vice-Chair also welcomed Steve Lewis (Chair of Trustees at Denefield School) who had joined the Forum as a new academy governor representative following a recent election.

1 Minutes of previous meeting dated 14th July 2025

The Minutes of the meeting held on 14th July were approved as a true and correct record and signed by the Vice-Chair

2 Actions arising from previous meetings

The Vice-Chair drew attention to the letter on page nine of the agenda pack regarding the high needs budget deficit. A reply had been received on behalf of the Secretary of State, though it did not contain any new information. This was noted by the Forum.

3 Declarations of Interest

Jo Lagares declared an interest in agenda item 11 due to being the headteacher at one of the schools listed in the report.

4 Membership

Jess Bailiss confirmed that Jackie Davies' term of office was due to end in October 2025 and she had agreed to continue for a further term. Charlotte Wilson's term was also due to end and she had confirmed she was willing to continue after consulting with academy colleagues.

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

Paul Davey presented the final report on behalf of the Task and Finish Group, which had been formed to improve the effectiveness and functionality of the Forum. The aim of the group had been to refocus the Forum's attention on its core purpose, enhance its function through better dialogue and address anomalies. One of the proposals included increasing transparency and inclusion around the Heads Funding Group (HFG), proposing its establishment as a formal sub-group.

The Vice-Chair drew attention to the recommendations set out in section two of the report:

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

As no questions or comments were raised during the presentation of the report it was proposed that the recommendations be considered together. The Vice-Chair invited the Forum to consider the recommendations set out above. The recommendations were proposed and seconded and at the vote the motion was approved.

RESOLVED that the Schools' Forum approved the recommendations set out in section two of the report. A section would be added to the Constitution following the meeting, acknowledging the HFG as a formal sub-group.

6 Schools Funding Formula Consultation 2026/27 (Lisa Potts)

Lisa Potts introduced the report (Agenda Item 7), which set out the requirements and changes for setting the primary and secondary school funding formula for 2026/27. The aim was to mirror the National Funding Formula (NFF) as closely as possible, incorporating local factors. Lisa Potts explained that DfE allocations for 2026-27 had been delayed due to the spending review, with figures expected in the autumn. The consultation pack used 2025-26 data, which would be updated.

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The report recommended that the consultation be undertaken with all schools on the areas set out in section 2.1 of the report. It was proposed that the consultation run from 15th October to 7th November 2025, which was a slightly extended period to incorporate half term and to enable schools to respond. The questions that would be included with the consultation were detailed in Appendix A to the report.

Lisa Potts drew attention to the detail regarding block transfers in section eight of the report. Paragraph 8.4 set out transfers previously agreed from the schools block to the high needs block. If a 0.5% transfer was approved for 2026/27 this would equate to around £700k.

The Vice-Chair noted that there were no comments on the report however, he suspected there would be more questions and comments at the next Forum meeting in December.

The Vice-Chair invited the Forum to consider the recommendations set out in section 2.1 of the report, that the consultation be undertaken with all schools between the 15th October and 7th November on the following areas:

- West Berkshire Council's proposed school funding formula for 2026/27
- An up to 0.5% transfer from the Schools Block to other funding blocks
- The criteria to be used to allocate additional funds
- The proposed services to be de-delegated.

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

RESOLVED that the Schools' Forum agreed the recommendations set out in section two of the report.

7 **Vulnerable Children's Grant - Annual Report for 2024/25 (Vanessa Grizzle)**

Neil Goddard presented the report (Agenda Item 8) as Vanessa Grizzle was unable to join due to internet issues. The report provided an annual update on the use of the Vulnerable Children's Grant (VCG).

The report set out proposals for how the funding could be used differently for the coming year, including a move towards a more coordinated approach across resources that were available to the Local Authority (LA). The approach would sit within the early intervention range of work. The approach would consolidate various funds previously applied for separately into a single triage route. This aimed to simplify access for schools and ensure better coordination of support. It would not mean that any resources were lost just that it could be accessed through a single front door to enable schools to access it as effectively as possible. The new system was expected to start in November, with guidance issued to schools before half term. The area of work had been led by Vanessa Grizzle, the Principal Educational Psychologist.

Neil Goddard also announced the appointment of a permanent Principal Educational Psychologist (starting December) and an interim Head of SEND (starting end of October).

Steve Lewis asked if there was a precedence for this type of initiative. Neil Goddard clarified that there was a precedence as the VCG already existed in a different format. It was an improvement of existing processes rather than entirely new.

Chris Prosser enquired whether there would be criteria for accessing the funding. Neil Goddard confirmed the criteria would be published prior to half term with the first panel

meeting taking place around November. There would be a transitional period and they were not looking to change the criteria significantly. Chris Prosser asked if schools would be made aware of the total sum available and Neil Goddard confirmed that he was unable to confirm the exact amount, but schools would be made aware of this. The figure would be included in the DSG budget report for the whole Forum to see. The aim was to speed the process up and for funding to be provided to schools in a timelier way.

Jacquie Davies praised the "one door" approach. She queried if it would be triage by a panel and if it would be a skilled panel. She stressed that the speed of response would be critical and was concerned about possible delays. Neil Goddard assured that the panel would meet regularly to minimise delays and that direct communication with services would remain possible.

RESOLVED that Schools' Forum noted the report.

8 Education Service Budget Monitoring - Quarter 1 (Lisa Potts/Neil Goddard)

Lisa Potts introduced the report (Agenda Item 9), which provided an overview of the Education Services budget, which had been requested at a previous meeting. The quarter one outturn showed an overspend of £287,710, with savings in home-to-school transport due to an increase in this budget in the current year. Lisa Potts cautioned that figures might change in quarter two due to pupil movements in September, such as transitions to secondary school.

Pressures were identified in Management and Strategy due to efficiency targets and also the inability to trade with the Educational Psychology Service. Lisa Potts pointed out a notable change in the disabled children's budget, much of which had been transferred to Children's Services at the end of the previous year. The remaining budget related to short breaks for disabled children.

Neil Goddard added that the report aimed to provide a broader understanding of the overall education budget with home to school transport making up a significant portion. Home to school transport remained a concern due to the historical overspend in this area and it was hoped that there would be a clearer picture of the position in the next three to four months.

Neil Goddard reported that a substantial recruitment effort had taken place in recent weeks, including appointments for interim Head of SEND, Head of Commissioning, Head of Early Years, and a potential offer for the Principal Improvement Advisor post. He noted that these additions were expected to improve service responsiveness. Regarding the Educational Psychology Service, although a Principal and Senior Educational Psychologist had been appointed, many vacancies remained and would continue to be managed.

Neil Goddard confirmed that the LA's budget planning for the next financial year was underway and updates would be provided to the Forum on next year's budget along with necessary actions that needed to be taken. Like all LAs, West Berkshire Council was having to manage significant budget pressure and Education Services had a part to play in addressing these.

Jacquie Davies raised a comment regarding the home to school transport budget. She expressed interest in being involved in any analysis of the underspend, citing her concerns about the impact of transport funding on children's education. Neil Goddard commented that it was important to note the substantial increase in the home to school transport budget compared to the previous year, alongside efforts to improve contract efficiency. He highlighted the importance of using the budget to support early help and intervention, ensuring that spending was targeted and effective. Neil Goddard welcomed

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Jackie Davies' input and stated that a clearer picture would emerge in two to three months once the September intake had been fully processed.

RESOLVED that the Schools' Forum noted the report.

9 DSG Monitoring 2025/26 - Quarter 2 (Lisa Potts/Neil Goddard)

Lisa Potts introduced the report (Agenda Item 10) noting that it was part of the regular quarterly reporting cycle. She summarised that the Dedicated Schools Grant (DSG) had carried forward a deficit of £16.1m and the current forecast projected an overspend of £30.2m by the end of the financial year. While this was a significant figure, Lisa Potts explained that it aligned with long-term projections, particularly in relation to pressures on the High Needs Block (HNB).

Lisa Potts highlighted several key changes, including updated grant allocations from the Department for Education (DfE). The Early Years Block had seen a substantial increase in funding due to the introduction of new funding streams for children aged nine months to two years, and for two-year-olds of working parents. As a result, the grant had risen from approximately £12 million to approximately £28 million. Lisa Potts explained that the Local Authority (LA) was permitted to retain four percent of this total to support centrally managed costs. It was anticipated that at least £300k could be used to reduce the overall deficit, with potential for more once trends for new funding streams were clearer.

Lisa Potts also reported a large change in the HNB due to Brookfields School's academisation. When the budget was originally set, Brookfields had been included in the LA's funding allocation. However, following the academisation, place funding went directly to the school from the DfE resulting in a £2 million adjustment in the LA's allocation. It was clarified that top-up funding would still be managed through the LA's budget.

Keith Harvey asked whether the funding now going directly to Brookfields followed the same formula previously used by the LA. Lisa Potts confirmed that the school received £10,000 per confirmed place directly from the DfE. She added that top-up funding would continue to be provided by the LA.

RESOLVED that the Schools' Forum noted the report.

10 Deficit Schools (Lisa Potts)

Lisa Potts introduced the report (Agenda Item 11), which provided details of the schools in deficit in 2025/26 and information on lessons learnt from monitoring schools in deficit. She reported that ten schools had been granted licensed deficits, with three additional submissions pending review. The total deficit across the ten licensed schools amounted to £945,900, as detailed in Table 4.3 of the report. Lisa explained that the table also outlined the recovery plans for each school and the rationale behind the licensing decisions.

Underlying causes of these deficits were largely consistent with previous years, including falling pupil numbers, increased support needs for high-needs pupils, rising costs, and reduced income. Lisa Potts expressed concern that more schools were now entering deficit positions, reflecting broader systemic pressures.

Reverend Mark Bennet raised concerns about the pressures faced by school business managers, noting that whilst their expertise contributed to better financial outcomes, recruitment was challenging and the role often carried disproportionate responsibility. He also highlighted the operational considerations for schools of merging year groups and suggested that sharing best practice could help schools manage such changes more

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effectively. Lisa Potts acknowledged the challenges raised and explained that while the LA's Schools' Accountancy Team provided support for schools, it was not possible to know the finer detail of each school's budget. Lisa Potts agreed that cultural change was needed to ensure governors and leadership teams took more ownership and noted that many business managers did seek advice from the LA on this.

Neil Goddard added that the business manager role was highly skilled and vital to school outcomes. He mentioned national support networks and emphasised the need for innovative thinking across schools. He also updated the Forum on the LA's strategic response to falling pupil numbers, noting that a consultation on managing surplus places would be launched after half term. It was noted that the schools struggling with pupil numbers were not entirely the same as those struggling with financial issues, which was often due to a much broader set of issues. He hoped to bring an update on this back to the next Forum meeting in December, so that it could form part of the consultation process.

Reverend Bennet suggested that financial communications should be directed to governors and senior leaders as well as business managers, to ensure shared responsibility. Neil Goddard agreed and confirmed this was one of the areas of communication the LA needed to review.

Paul Davey called for a clear, overarching education strategy for West Berkshire, developed collaboratively with schools and Forum members. Neil Goddard noted and agreed with the points raised. Whilst individual strategies existed there was not a broader children's strategy. He was confident that this area would progress, supported by the recent recruitment. It was confirmed that Councillors would be briefed on school place planning and that it was not something that could be done without there being impact in some areas, and these would need to be managed as carefully as possible. Neil Goddard reiterated the importance of consultation and acknowledged the political dimensions of the issue. Paul Davey emphasised the value of the Forum as a powerful resource and urged greater involvement in strategic planning.

Michelle Harrison raised concerns about support for deficit schools following the retirement of a key staff member. Lisa Potts confirmed that rather than appointing a direct replacement the plan was to train additional team members to provide support to deficit schools, recognising the growing number and scale of deficits.

RESOLVED that 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 1st December 2025 at 5pm on Zoom.

(The meeting commenced at 5.00 pm and closed at 5.53 pm)

CHAIR

Date of Signature

Agenda Item 3

Actions from previous meetings

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Update
Oct25-Ac1	13th October 2025	Schools' Forum - Governance Review	A section would be added to the Constitution following the meeting, acknowledging the HFG as a formal sub-group.	Jess Bailiss	This has been added to the Forum's Constitution and published on the Forum's webpage. The revised HFG Terms of Reference are also included under Agenda Item 7 for consideration.

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HEADS FUNDING GROUP**MINUTES OF THE MEETING HELD ON
TUESDAY 18 NOVEMBER 2025**

HFG Members Present: Kavash Bamfield, Catherine Bernie, Nicolle Browning, David Fitter, Michelle Harrison, Keith Harvey, Julie Lewry, Jo MacArthur, David Ramsden, Chloe Summerville and Edwin Towill

Also Present: Toby Bradley (Service Lead, Financial Management), Neil Goddard (Service Director - Education and SEND), Emma Ferrey (Interim Service Manager Of SEN), Beth Kelly (Head of Early Years), Vanessa Grizzle (Principal Educational Psychologist) Lisa Potts (Finance Manager) and Jessica Bailiss (Democratic Services Officer)

Apologies for inability to attend the meeting: Jacquie Davies, Jon Hewitt, Beth Kelly, Chris Prosser and Charlotte Wilson

PART I**8 Minutes of the Previous Meeting**

The minutes of the previous meeting were agreed as a true and accurate record.

9 Heads' Funding Group Terms of Reference

Neil Goddard introduced the draft revised Terms of Reference for the Heads' Funding Group (HFG), which reflected changes agreed by the Schools' Forum in October. A version of the ToR showing the proposed changes was circulated with the agenda.

RESOLVED that

- the HFG were happy with the proposed changes and that they accurately reflected the recommendations agreed by the Schools' Forum in October.
- The ToR would go forward to the Schools' Forum on 1st December for consideration and approval.

10 School Funding Formula 2026/27 (Lisa Potts)

Lisa Potts introduced the report, which set out the result of the consultation with all schools on the proposed primary and secondary schools funding formula for 2026/27.

The HFG considered the responses from schools to each of the questions set out in the consultation in forming their recommendations to the Schools' Forum. The HFG discussed the potential block transfer in detail, where the majority of schools that had responded to the consultation had supported no transfer. The HFG voiced concerns about the financial situation facing schools and reduced funding along with the lack of impact analysis when block transfers had been agreed in the past.

It was noted that the data that the criteria for agreeing the additional high needs funding was based on was incorrect. This needed to represent the number of Education, Health and Care Plans (EHCPs), and students in different schools. It was also noted that this data was only based on West Berkshire EHCPs, which did not feel fair. **Lisa Potts would update the incorrect data in time for the Schools' Forum meeting in December.**

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The HFG was thankful to the schools that had responded but the response rate of 20 schools was deemed disappointing. Going forward increased effort would be placed on encouraging more schools to respond to the consultation as it was important it was as reflective as possible.

RESOLVED that:

- Lisa Potts would update the incorrect data regarding additional high needs funding in time for the Schools' Forum meeting in December.
- The HFG recommended that the following points be added to the report in time for the Schools' Forum meeting:
 1. Clarity around the timing of data captured to ensure accuracy.
 2. That going forward officers would look into how cross border EHCP placements should be reflected in the criteria for allocating additional high needs funding.
- The HFG recommended to the Schools' Forum:
 - a) To mirror the Department for Education (DfE) 2026/27 National Funding Formula (NFF) to calculated funding allocations.
 - b) To address any surplus or shortfall in funding by adjusting the AWPU values.
 - c) That a 0% block transfer be agreed. *Regarding whether the Local Authority would subsequently appeal this decision if agreed, it was noted that this would be a political decision based on the outcome of the Schools' Forum decision.*
 - d) To approve the criteria to be used for the allocation of additional funds.
 - e) The HFG was supportive of the principle of de-delegating services, however, each service would be considered in more detail as part of the next two items.

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

Lisa Potts introduced the report, which set out the details, cost and charges to schools of the services on which maintained school representatives were required to vote (on an annual basis). The group reviewed annual de-delegation proposals, noting changes from previous years. It was noted that the Ethnic and Traveller Achievement Service (EMTAS) would be delivered in a different way in 2026/27 and not de-delegated. It was also noted that the school improvement service would no longer be de-delegated and would be funded as a strategic local authority (LA) function.

Questions and concerns were raised regarding the Promoting Inclusive Practice Service (PIPS) particularly around the need for evidence to ensure value for money however, it was noted that this would be discussed in more detail as part of the next item on the agenda. Queries were raised about the name of the service 'PIPS' noting it was very close to the name of another service used by schools, so this would be looked into to avoid confusion.

RESOLVED that the HFG recommended that the proposed de-delegations (*apart from PIPS, which was discussed in more detail as part of the next item*) go forward to the Schools' Forum on 1st December for consideration.

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

Vanessa Grizzle introduced the report, which provided an outline of the Promoting Inclusive Practice Service (PIPS) offer for consideration to maintain de-delegation funding. The group considered the proposals for PIPS, its role in supporting pupils with

complex Social, Emotional and Mental Health (SEMH) needs and options for funding. Key points included the need for service redesign, evidence of impact and future sustainability.

It was noted that the proposal in the report was to continue with de-delegation of the service. The HFG discussed the potential move to a traded model after a transition period and suggested that, for the Schools' Forum meeting, PIPS be separated from the other de-delegations where there was already evidence of impact.

RESOLVED that:

- The HFG recommended that PIPS be considered and voted on separately to the other proposed delegations at the Schools' Forum meeting on 1st December.
- The PIPS report would be updated to reflect the HFG's discussion and address concerns including the suggestion to retain PIPS funding via de-delegation for one year to allow service redevelopment, with a view to moving to a traded model thereafter.

13 Early Years Budget 2025/26 - In Year Position (Beth Kelly)

Lisa Potts introduced the report, which provided an overview of the current Early Years Block (EYB) Position following childcare entitlement expansions and highlighted issues with the MRI system affecting forecasting. Despite previous deficits in the EYB, updated calculations showed a significantly reduced deficit due to higher funding streams and lower central spend. It was expected that a more accurate forecast could be provided once there was more reliable data on actual hours across each funding stream.

The HFG discussed the possibility of a block transfer from the early years block to support high needs however, acknowledged this would be subject to governance and consultation with the Early Years Funding Group.

RESOLVED that the HFG recommended that:

- Finance Officers to investigate feasibility of a block transfer from the Early Years block to High Needs, including financial governance requirements, compliance with pass-through rate, and assessment of corporate impact on weighted average cost of debt and associated interest implications.
- The HFG noted the report, which would go forward to the Schools' Forum meeting on 1st December for discussion and comment.

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

Lisa Potts introduced the report, which set out the budget proposals for services funded from the Central Schools Services (CSSB) block of the Dedicated Schools Grant ((DSG)). It was noted that to date there had been no indication of the value of the grant to be received. The DfE were due to communicate an update in late November 2025.

RESOLVED that the HFG noted the report, which would go forward to the Schools' Forum meeting on 1st December for discussion and comment.

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

Lisa Potts introduced the report, 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 the likely shortfall. The HFG noted the estimated High Needs Block budget for 2026/27, projecting costs of £47 million against a £30 million allocation, leaving a

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significant overspend. Detail on the key drivers of this overspend were included within the report.

It was clarified that the HNB deficit recovery plan formed part of the SEND action plan that had resulted from the Delivering Better Value programme. The commissioning team and early intervention work were highlighted as critical to reducing future costs. Concern was raised about the limbo being faced regarding the awaited SEND Strategy and strategic view from central government expected in January 2026.

RESOLVED that:

- Lisa Potts to add a column showing the number of pupils supported by top up funding. This would help improve transparency and understanding of how funding related to pupil numbers.
- Tony Parker, the new Service Lead for Children's Commissioning, would be invited to a to a future HFG/Schools' Forum to explain efficiency plans.
- The HFG noted the report, which would go forward to the Schools' Forum meeting on 1st December for discussion and comment.
- Updated High Needs Block figures and final budget proposals would be brought to the January round of meetings for consideration.

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

Neil Goddard introduced the report, which provided an overview of the Education Service budget for Quarter two. Lisa Potts clarified that SEN Assessments were included in the School Improvement and SEN Services line on page 77 of the report.

It was noted that the figures were from the end of September 2025 and therefore were likely to change for quarter three. Lisa Potts provided detailed key figures within the report.

RESOLVED that The HFG noted the report, which would go forward to the Schools' Forum meeting on 1st December for discussion and comment.

17 Any Other Business

The group discussed concerns about a recent request for detailed financial data from schools. Heads raised workload implications and questioned whether existing reporting mechanisms could be used instead. Finance Officers explained the request was driven by an audit highlighting a significant decline in school balances and the need for data to enable statistical analysis and forecasting. Some of the information required was not held by the LA and needed to come from schools. An email would be issued shortly providing further context to the request. It was noted that the LA was working hard to minimise demand on schools as much as possible.

18 Date of the next Heads Funding Group meeting

The next HFG meeting of the HFG would take place on 7th January 2026.

(The meeting commenced at 3.30pm and closed at 5.37pm)

Heads' Funding Group: Terms of Reference

Report being considered by: Schools' Forum

Date of Meeting: 1st December 2025

Report Author: Neil Goddard and Jessica Bailiss

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

1. Purpose of the Report

1.1 To seek Schools' Forum approval for the revised Terms of Reference (ToR) for the Heads' Funding Group (HFG).

2. Recommendation

2.1 That the Schools' Forum approves the revised ToR for the HFG as set out in Appendix A to this report.

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

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

4. Executive Summary

4.1 The revised ToR for the HFG in Appendix A, have been developed following a governance review by the Schools' Forum Task and Finish Group and subsequent recommendations agreed by the Schools' Forum in October. The review sought to clarify the role and remit of the HFG and improve the group's effectiveness and transparency by formalising its status as a sub-group of the Forum and ensuring meetings are scheduled earlier in the cycle to provide timely input. The revised ToR reflect these agreed changes.

Issue Identification

4.2 The governance review identified that the HFG's current arrangements limited effectiveness and transparency, requiring formalisation and clearer scheduling.

Consultation and Engagement

4.3 The revised ToR were developed following the governance review by the Task and Finish Group and the recommendations agreed by the Schools' Forum in October. They were subsequently discussed by the HFG at its meeting on 18th November.

Monitoring and Evaluation

4.4 The Terms of Reference will be kept under review and can be amended at any time if required.

5. Conclusion

5.1 Approval of the revised Terms of Reference will formalise the agreed governance improvements, ensuring the HFG operates effectively as a transparent and influential sub-group of the Schools' Forum.

6. View from the Heads' Funding Group

6.1 The draft ToR were presented to the HFG at its meeting on 18th November and the group was happy with the proposed changes and that they accurately reflect the recommendations agreed by the Schools' Forum in October.

7. Appendices

7.1 Appendix A – HFG ToR

Appendix A

Heads' Funding Group (HFG) Terms of Reference Updated December 2025

1. Purpose

- 1.1 The Heads Funding Group (HFG) is a formal sub-group of the Schools' Forum. Its purpose is to provide strategic input and recommendations on matters relating to school funding, in advance of Schools' Forum meetings.
- 1.2 The HFG shall meet prior to Forum meetings, in accordance with a schedule agreed annually, to ensure timely and effective contribution to the decision-making process.
- 1.3 The HFG provides advice and recommendations on matters within the remit of the Schools' Forum, as defined in Section A of the Schools' Forum Constitution, relating to annual decisions and consultations.

2. Meeting Governance and Administration

- 2.1. The HFG does not hold formal decision-making powers. Where appropriate, the group may take indicative votes to agree a preferred recommendation for submission to the Schools' Forum.
- 2.2. The HFG will be chaired by the Service Director for Education and SEND and supported by the Finance Manager – Schools
- 2.3. HFG meetings should take place prior to Schools' Forum meetings to enable the group to provide timely and influential input on matters being reported to the Forum (Schedule to be agreed).
- 2.4. Minutes will record action points and recommendations only and will be shared with the Schools' Forum to support transparency.

3. Membership

- 3.1. Membership will be cross phase and is open to all headteachers (and school business managers) who are members of the Schools' Forum (SF membership is reviewed annually to ensure it meets the regulations).
- 3.2. Members represent all schools in their phase.
- 3.3. Maximum membership will be as follows:

Membership Group	Total
Maintained Primaries	5
Maintained Secondaries	3
Academies	5 (including special academy)
Maintained Special	1
Maintained Nursery	1
Maintained PRU	1
TOTAL	16

4. Absence

- 4.1. Where a headteacher is unable to attend a HFG meeting they should send apologies for absence and organise for a substitute head to attend from the same membership group.
- 4.2. Comments and questions in writing will not be accepted. If the head has matters they particularly wish to raise they should inform their substitute/ other heads in their membership group.

5. Functions

- 5.1. The group will operate in the context of national funding changes, such as reduced flexibility, the introduction of a national formula and significant initiatives e.g. SEND reforms. This will involve an analysis of impact and making recommendations to the SF.
- 5.2. The HFG will make recommendations to the SF about the funding formula and deployment of any additional funding, 'headroom', under -spend or overspend.
- 5.3. The HFG will review annual benchmarking data such as the local AWPU rate, comparing West Berkshire's position with the national average and statistical neighbours.
- 5.4. The group will carry out impact scrutiny reviews of DSG funded provisions e.g. various areas of expenditure in the High Needs Block.
- 5.5. The HFG will deliver a planned programme of work to support the SF through its annual cycle of decision making.

Schools Funding Formula 2026/27: Consultation Results

Report being considered by: Schools' Forum

Date of Meeting: 1st December 2025

Report Author: Lisa Potts

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

1. Purpose of the Report

- 1.1 To set out the results of the consultation with all schools on the proposed primary and secondary school funding formula for 2026/27.
- 1.2 For Schools Forum to consider the Local Authority and Heads Funding Group recommendations to Schools Forum.

2. Recommendations

- 2.1 Following consultation, the Local Authority recommend the following for setting the school funding formula for 2026/27, for approval at Schools Forum and to go as a recommendation for political ratification:
 - (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.
 - (c) To consider whether to apply a top slice to the schools' funding to support the High Needs Block, and at what percentage.
 - (d) To approve the criteria to be used to allocate additional funds.
 - (e) To approve the proposed services to be de-delegated.
- 2.2 Following the meeting of 18th November 2025, the Heads Funding Group (HFG) recommendations were as follows:
 - (a) Agree
 - (b) Agree
 - (c) Recommended a 0% block transfer
 - (d) Agree
 - (e) Agree for 2026/27 in line with the consultation responses. However, recommendation that the de-delegation of PIPS is voted on separately.

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			The NFF has a positive impact on some protected characteristics. If a transfer to the high needs block is supported this would further support disability.
Data Impact:		X		

4. Executive Summary

- 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 consultation was open for just over three weeks from 15th October 2025 to 7th November 2025 and 20 responses were received.
- 4.3 A summary of the responses is tabled below:

	Yes	No	0%	0.35%	0.50%	1%
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?	19	1				
2. Do you agree that any shortfall or surplus in funding is addressed by adjusting the AWPU values?	18	3				
3. What percentage transfer of funding would you support from the Schools Block to the High Needs block?			14	3	2	0
4. Do you agree with the criteria set to access additional funds outside the school formula?	17	3				
5. Do you agree with the proposed De-delegated Services, Education Functions and Health and Safety Service for all maintained schools?	12	1				

Consultation and Engagement

4.4 The consultation was open for just over three weeks from 15th October 2025 to 7th November 2025 with all academy and maintained schools.

Monitoring and Evaluation

4.5 Not required.

Recommended Option

4.6 To take into account the responses of the consultation.

5. Introduction and background

5.1 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.

5.2 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.

5.3 However, the notional NFF allocations for schools for 2026-27 are yet to be published, with an indication as to the publication date being by the end of November 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.

5.4 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 was important to still seek views from schools on the relevant areas of the budget that remain subject to local decision making.

5.5 The LA will remain responsible for determining final allocations to schools, in consultation with the Schools Forum.

5.6 The LA has the right of appeal to the Secretary of State on any funding decisions made by the Schools Forum.

5.7 Political ratification must be obtained before the January 2026 APT submission deadline (not yet confirmed but expected to be around 21-23 January 2026).

6. Consultation responses

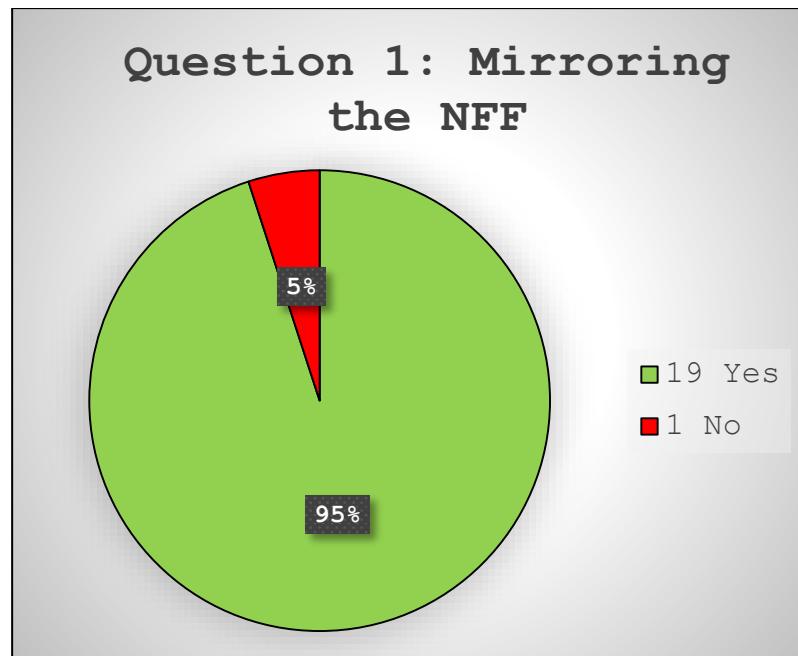
Question 1:

6.1 2026/27 is the fourth year of transition to the direct schools National Funding Formula (NFF). Local authorities:

- Must use all NFF factors other than the following optional factors: rates, PFI contracts and exceptional circumstances.
- Will only be allowed to use NFF factors in their local formulae.

- 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).

6.2 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



Comments in support:

“Aligning the local formula with the NFF ensures transparency, predictability, and equity across schools. It also supports long-term financial planning and minimises turbulence in individual school budgets”

“This is consistent with previous years. Not mirroring the NFF would be contrary to the requirement to move local formula factor values closer to the NFF year on year”

Comments against:

“While we support the principle of national consistency, full mirroring of the NFF without local adjustment disadvantages small inclusive schools. The NFF and the proposed Additional High Needs Fund criteria do not recognise the disproportionate costs of meeting statutory SEND duties in small settings with limited economies of scale. We therefore urge West Berkshire to retain local discretion through the lump sum and sparsity factors to protect school viability and to ensure that schools can discharge duties under the Children and Families Act 2014.”

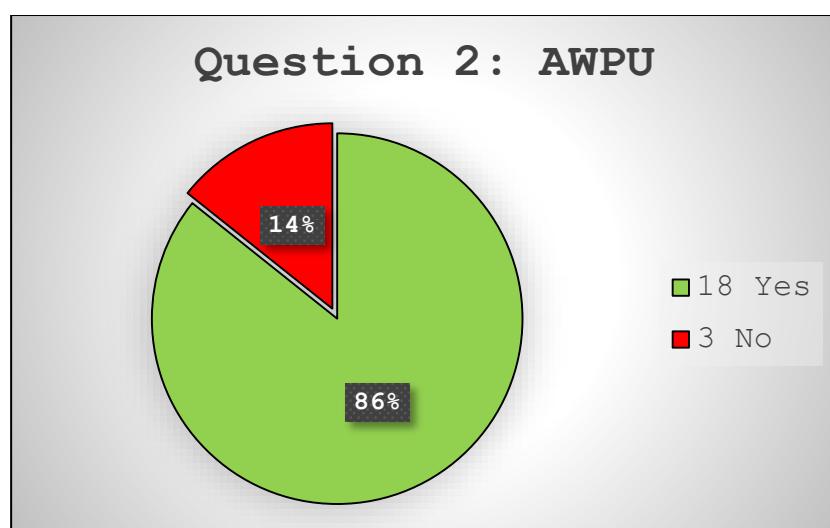
HFG recommendation:

6.3 Agree

Question 2:

6.4 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. Amending the Age Weighted Pupil Unit (AWPU), the basic funding entitlement, is the LA's recommendation as this would restrict the gains of all schools, but protects some schools by the minimum funding guarantee (MFG).

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

**Comments in support:**

“Yes - if adjusted up/ No if reduced. If AWPU adjusted up may meet challenges faced by small schools. Reducing AWPU would further erode the core budgets of small schools which are already under pressure from unfunded SEND provision. This compromises school's capacity to function under a business model that is appropriate to statutory duties and provisions required of a school. If affordability adjustments are required, they should be spread proportionately across factors or offset against central reserves rather than a flat per-pupil cut.”

“Adjusting AWPU is the fairest and most consistent method to manage affordability, as it applies proportionately to all schools. Alternative approaches could disproportionately affect schools with higher levels of additional needs or smaller schools.”

“Adjusting AWPU values is the fairest way of addressing any shortfall or surplus as it affects all schools equally in proportion to their size and phase. It is consistent with previous years.”

“This is the fairest way of doing this”.

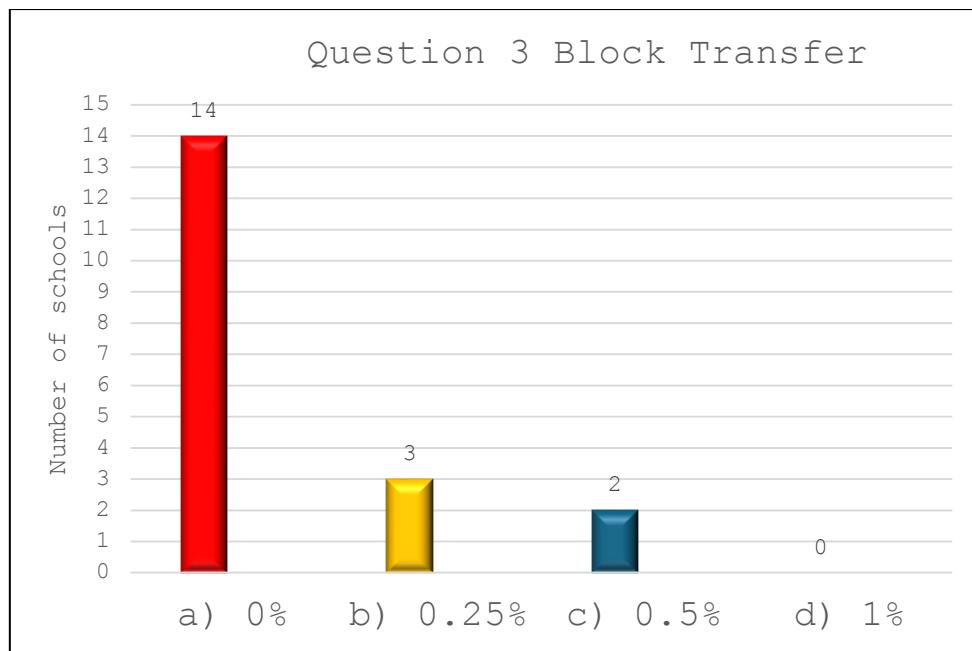
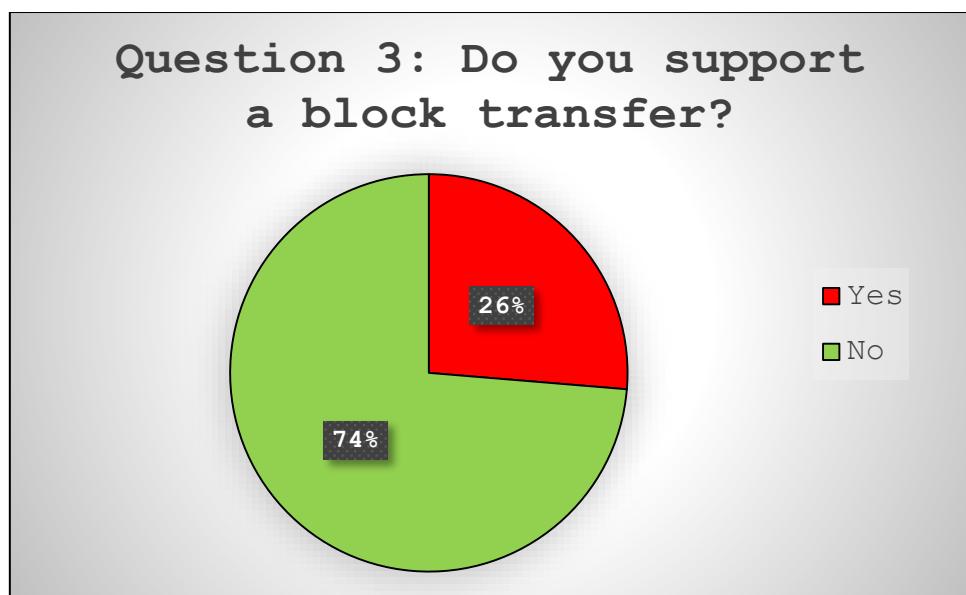
HFG recommendation:

6.6 Agreed

Question 3:

6.7 The NFF allows for a transfer up to 0.5% of the 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 can submit a disapplication request to the Secretary of State.

6.8 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%, D) 1%.



Comments in support:

“Deficits in the high needs block are increasing exponentially. We need to make some attempt to at least appear to reduce the deficit, or we are adding further problems for the future.”

“While I recognise the significant and growing pressure in the High Needs Block and the importance of ensuring appropriate provision for pupils with SEND, any transfer reduces resources available to mainstream schools, which are also facing increasing cost pressures. I would welcome clearer evidence of:

*the specific impact of 0%, 0.25% and 0.5% transfers on mainstream budgets,

*how any transferred funding will be targeted and monitored,

*how this aligns with the long-term strategy to reduce the DSG deficit.

A decision should be based on transparent financial modelling and assurance that both mainstream and high needs sectors are being supported sustainably.”

Comments against:

“Until West Berkshire ensures timely and sufficient top-up payments to mainstream schools, transferring Schools Block funds will worsen pressures on inclusive schools. Our school has funded LA statutory duty to meet need of pupils that far outstrips income we receive. For instance, as a small school we have carried costs exceeding £28,000 for one pupil since March 2024, with only £12,000 confirmed from October 2025. Our full notional is £38,000. Redirecting core funding to the High Needs block without accountability for distribution compounds inequity and risks breaching schools’ ability to meet statutory SEND duties.”

“as we already pick up the shortfall and are underfunded for pupils with complex needs”

“We are sympathetic to the idea of top-slicing Schools Block funding to help support high needs students in the LA. However, it is not clear how past transfers of funding into the high needs block have been used to support high needs students, or what the plan is for using any additional funding from the Schools Block in 2026/27. We are concerned that the funding would simply be used to reduce the HNB deficit. Even if this were the case, a contribution of £0.5m is unlikely to make any significant impact on an estimated HNB deficit of £31.5m. We believe schools would make more effective use of the funding for their high needs students, and so our preference is for a 0% transfer in 2026/27.”

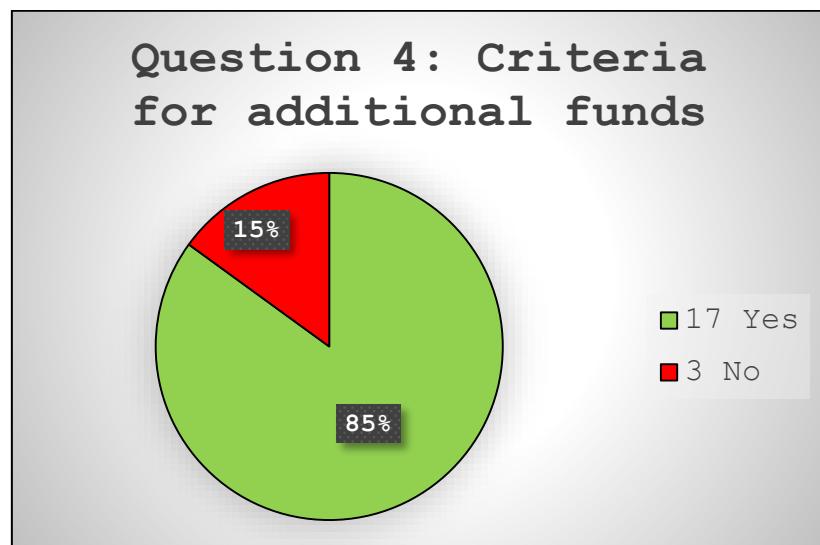
HFG recommendation:

6.9 Recommended a 0% block transfer

Question 4:

6.10 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.

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

**Comments in support:**

“The criteria appear clear, objective, and compliant with DfE expectations. The Growth Fund supports schools expanding to meet basic need, while the Additional High Needs”

“The formulas for allocating growth funding and additional SEN funding are clear and fair. However, the SEN funding model in Appendix C should take account of all high needs pupils in a school, including those from other LAs, not just those from WBC. The model as currently shown risks disadvantaging schools where a significant proportion of their pupils come from Reading or other LAs.”

Comments against:

“While we welcome transparent criteria, the current proposals do not address the position of small schools with a high proportion of lower-level but cumulative SEND costs. The Additional High Needs Fund threshold (“1 % above average EHCP pupils”) excludes schools like Brightwalton that face disproportionate financial impact without high numbers of EHCPs. We recommend a revised model that includes a “cost-per-pupil impact measure” or a small-school weighting within the Additional High Needs Fund.”

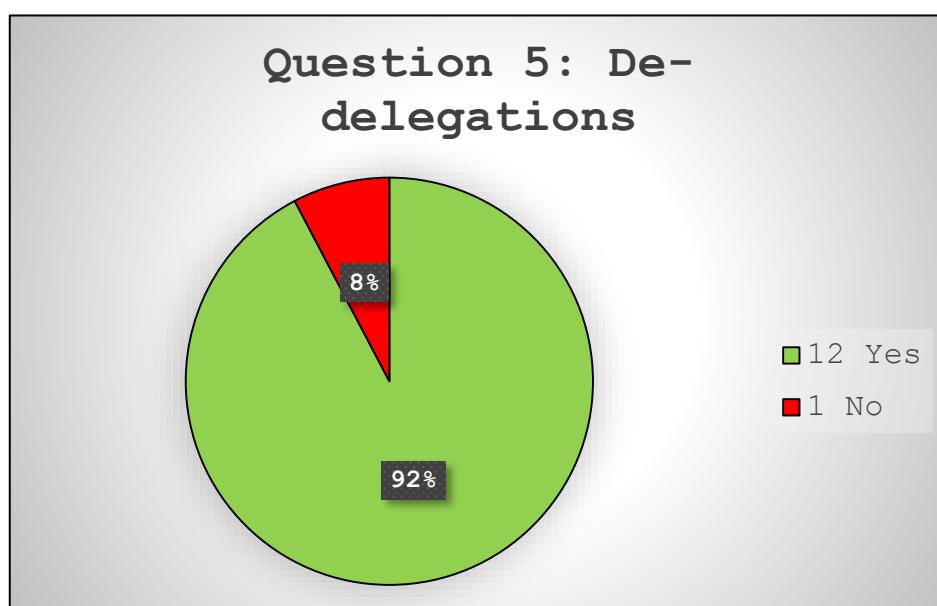
“Be good to see this included as border schools at a disadvantage. I pick it every time and with funding for high needs so poor in schools (mainstream) we need every pound.”

HFG recommendation:

- 6.12 Agree to the criteria. HFG have asked for clarification on the timing of data capture in Appendix C as this is currently taken in September during a large transition for many pupils.
- 6.13 HFG have also requested that officers look at how cross border EHCP placements should be reflected in the criteria for allocating additional high needs funding.

Question 5

- 6.14 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. The de-delegations need to be re-determined on an annual basis.
- 6.15 The services currently and proposed to be de-delegated for primary and secondary only are Promoting Inclusive Practice Service, Trade Union Local Representation and CLEAPSS.
- 6.16 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. The services for maintained schools are Statutory and Regulatory Duties comprising statutory accounting functions, internal audit and administration of pensions.
- 6.17 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.
- 6.18 Do you agree with the proposed De-delegated Services, Education Functions and Health and Safety Service for all maintained schools? Yes/No



Comments in support:

“We support de-delegation where services are demonstrably effective and proportionate. However, costs must reflect school size and not absorb funds needed for to ensure appropriate delivery of education, SEND provision or safeguarding compliance and other statutory duties required of a school. Annual service evaluations should show clear value for small schools. Currently we are heading for deficit due to lack of appropriate income to meet needs of pupils who require EHCP provision. This then compromises our ordinary available. Our delegated budget is not sufficient to run our school to meet needs of all pupils. Understanding capacity of schools and associated costs required of them to meet their core business duties is essential. Currently there appears to be a lack of understanding of funding schools require to meet their core costs, further impacted by insufficient LA support to meet duty that is LA's responsibility.”

“An analysis of the impact and costs of each individual service would help assessment with whether they represent VFM”

“These services offer essential support that would be more costly or less efficient to commission individually. The continued provision of statutory and regulatory services, including Health and Safety and financial compliance functions, remains vital to ensuring maintained schools meet legal responsibilities.”

Comments against:

“I can't answer as I would need to know more about the costs and options as very little of these services are used by the federation vs the impact on our funding.”

“Not relevant for academies”

“NO because I don't agree money being taken centrally for the Promoting Inclusive Practice Service – this should be a buy back service IF school s want it”

“unsure as we have to buy SLAs on top regardless of top slice.”

HFG recommendation:

6.19 Agree for 2026/27 in line with the consultation responses. However, recommendation that the de-delegation of PIPS is voted on separately.

7. View from the Heads' Funding Group

7.1 Following the meeting of 18th November 2025, the Heads Funding Group (HFG) recommendations were as follows:

- (a) Agree
- (b) Agree
- (c) Recommended a 0% block transfer
- (d) Agree
- (e) Agree for 2026/27 in line with the consultation responses. However, recommendation that the de-delegation of PIPS is voted on separately

7.2 Heads Funding Group requested that the table within Appendix C – Additional High Needs Fund Criteria of the Schools Consultation be re-stated for Schools Forum to ensure September top ups included. This table is shown in Appendix A.

8. Appendices

Appendix A – Schools Consultation – Additional High Needs Funding Criteria

Appendix B – Equality Impact Assessment

Appendix A

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 November 2025	Notional SEN Budget 2025/26	Average No. of Pupils Formula Funded	High Needs Pupils Above Average (un rounded)	Indicative Add'l Funding
	Primary Secondary				3.87%	1% above LA avg	£6,000
					3.39%	1% above LA avg	0
91000	Aldermaston C.E. Primary School	116	5	51,606	4.49	0.51	3,084
91100	Basildon C.E. Primary School	156	1	46,601	6.03	0.00	0
91300	Beedon C.E. (Controlled) Primary School	22	3	15,978	0.85	2.15	12,895
91400	Beeham Primary School	45	5	23,291	1.74	3.26	19,559
91200	Birch Coppice Primary School	417	6	101,334	16.13	0.00	0
91500	Bradfield C.E. Primary School	150	6	46,924	5.80	0.20	1,195
91600	Brightwalton C.E. Aided Primary School	87	1	25,718	3.36	0.00	0
91700	Brimpton C.E. Primary School	47	0	24,071	1.82	0.00	0
91800	Bucklebury C.E. Primary School	113	3	40,856	4.37	0.00	0
91900	Burghfield St Mary's C.E. Primary School	207	5	82,588	8.01	0.00	0
92000	Calcot Infant School and Nursery	170	5	79,756	6.57	0.00	0
92100	Calcot Junior School	261	10	97,280	10.09	0.00	0
95222	Chaddleworth St Andrew's C.E. Primary School	26	0	10,341	1.01	0.00	0
92400	Chieveley Primary School	171	4	52,184	6.61	0.00	0
95900	Cold Ash St Mark's C.E. School	203	4	51,568	7.85	0.00	0
92200	Compton C.E. Primary School	166	3	60,214	6.42	0.00	0
92300	Curridge Primary School	96	5	30,056	3.71	1.29	7,725
92500	Downsway Primary School	212	9	73,148	8.20	0.80	4,809
92800	Enborne C.E. Primary School	81	1	14,770	3.13	0.00	0
92900	Englefield C.E. Primary School	110	0	19,770	4.25	0.00	0
93000	Falkland Primary School	411	6	137,268	15.89	0.00	0
93100	Fir Tree Primary School and Nursery	211	4	91,701	8.16	0.00	0
93200	Francis Baily Primary School	531	14	254,233	20.53	0.00	0
93400	Garland Junior School	185	7	57,304	7.15	0.00	0
93500	Hampstead Norreys C.E. Primary School	49	0	17,024	1.89	0.00	0
93600	Hermitage Primary School	172	8	43,150	6.65	1.35	8,091
	Highwood Copse Primary School	138	4	19,024	5.32	0.00	0
93700	Hungerford Primary School	328	14	182,060	(2.68)	1.32	7,894
92700	The Islesley Primary School	49	1	11,430	1.89	0.00	0
93800	Inkpen Primary School	37	5	21,146	1.43	3.57	21,415
93922	John Rankin Infant and Nursery School	228	12	155,777	8.82	3.18	19,097
94000	John Rankin Junior School	348	4	125,812	13.46	0.00	0
94100	Kennet Valley Primary School	199	18	84,000	7.70	10.30	61,826
94200	Kinbury St Mary's C.E. Primary School	122	6	59,224	4.72	1.28	7,692
94300	Lambourn CofE Primary School	136	4	68,352	5.26	0.00	0
94400	Long Lane Primary School	207	6	105,243	8.01	0.00	0
97522	Mortimer St John's C.E. Infant School	165	3	48,078	6.38	0.00	0
97522	Mortimer St Mary's C.E. Junior School	235	10	62,831	9.09	0.91	5,473
94500	Mrs Bland's Infant School	126	4	37,922	4.87	0.00	0
94600	Pangbourne Primary School	136	3	53,364	5.26	0.00	0
94822	Parsons Down Partnership	257	8	111,975	9.94	0.00	0
94900	Purley CofE Primary School	81	3	40,280	3.13	0.00	0
95000	Robert Sandlands Primary School and Nursery	211	7	74,607	8.16	0.00	0
95100	Shaw-cum-Donnington C.E. Primary School	91	1	52,866	3.52	0.00	0
95200	Shefford C.E. Primary School	52	2	15,951	2.01	0.00	0
95300	Speenhamland School	292	11	136,868	(1.29)	0.00	0
95400	Springfield Primary School	300	8	101,919	11.60	0.00	0
95500	Spurcroft Primary School	368	11	142,593	14.23	0.00	0
95700	St Finian's Catholic Primary School	203	9	69,600	7.85	1.15	6,898
97700	St John the Evangelist C.E. Nursery and Infant Sch	171	1	58,925	6.61	0.00	0
97800	St Joseph's Catholic Primary School	213	7	84,192	8.24	0.00	0
96200	St Nicolas C.E. Junior School	255	7	81,240	9.86	0.00	0
96100	St Paul's Catholic Primary School	296	2	108,943	11.45	0.00	0
96322	Stockcross C.E. School	80	1	18,165	3.09	0.00	0
96400	Streatley C.E. Voluntary Controlled School	98	0	25,573	3.79	0.00	0
96500	Sulhamstead and Ulton Nerves School	99	3	47,946	3.83	0.00	0
99700	Thatcham Park CofE Primary	318	9	92,728	12.30	0.00	0
96600	Theale C.E. Primary School	308	7	70,572	11.91	0.00	0
96322	Welford and Wickham C.E. Primary School	62	2	18,872	2.40	0.00	0
96800	Westwood Farm Infant School	178	1	63,523	6.88	0.00	0
96900	Westwood Farm Junior School	239	6	76,756	9.24	0.00	0
97000	Whitelands Park Primary School	396	10	187,350	15.31	0.00	0
98700	The Willows Primary School	339	10	182,731	13.11	0.00	0
99400	The Winchcombe School	414	14	191,340	16.01	0.00	0
97300	Woolhampton C.E. Primary School	102	3	37,930	3.94	0.00	0
97400	Yattendon C.E. Primary School	90	3	26,490	3.48	0.00	0
99800	Denefield School	963	14	409,296	32.69	0.00	0
98800	The Downs School	1,045	25	359,218	35.47	0.00	0
99000	John Ogaunt School	448	20	277,274	15.21	4.79	28,765
99100	Kennet School	1,485	37	729,271	50.40	0.00	0
99200	Little Heath School	1,313	9	471,318	44.57	0.00	0
99300	Park House School	892	14	343,376	30.28	0.00	0
99800	St Bartholomew's School	1,352	41	517,511	45.89	0.00	0
99500	Theale Green School	725	17	305,569	24.61	0.00	0
99900	Trinity School	1,188	35	622,721	40.32	0.00	0
99600	The Willink School	1,031	38	389,543	34.99	3.01	18,036
PRIMARY TOTAL		12,382	355	479	31	187,653	
SECONDARY TOTAL		10,442	250	354	8	46,801	
TOTAL ALL SCHOOLS		22,824	605	833	39	234,454	

West Berkshire Council

Equity Impact Assessment

TEMPLATE

March 2023

Contents

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Section 1: Summary details

Directorate and Service Area	People CS, Education and Resources, Finance Property and Procurement
What is being assessed (e.g. name of policy, procedure, project, service or proposed service change).	The schools funding formula 26/27
Is this a new or existing function or policy?	No, annual setting of the formula
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).	Annual setting of the schools funding formula. WBC follows the NFF so already has funding factors in to protect some characteristics, therefore does not unfairly disadvantage individuals or groups within the community.
Completed By	Lisa Potts
Authorised By	
Date of Assessment	10.11.25

Section 2: Detail of proposal

Context / Background Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.	Following the NFF for schools funding
Proposals Explain the detail of the proposals, including why this has been decided as the best course of action.	All schools consulted with. Results and recommendations within this report.
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.	As per the report.

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.	Consultation responses have been considered
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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 checked="" type="checkbox"/>		<input type="checkbox"/>	The NFF differentiates between primary and secondary phases of education, recognising that as pupils progress through key stages, the breadth and complexity of the curriculum increases, leading to higher costs. As WBC follows the NFF there will be no additional impact on age that should be considered.		Lisa Potts, Finance Manager	
Disability	<input type="checkbox"/> <input checked="" type="checkbox"/>		<input type="checkbox"/>	The NFF provides protection for the funding		Lisa Potts, Finance Manager	

				of children and young people with SEN and disabilities. By supporting a block transfer from schools to high needs, this would further support disability.			
Gender Reassignment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Lisa Potts, Finance Manager	
Marriage & Civil Partnership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Lisa Potts, Finance Manager	
Pregnancy & Maternity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Lisa Potts, Finance Manager	
Race	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The NFF uses additional needs factors of deprivation, low prior attainment and English as a foreign language, and mobility.		Lisa Potts, Finance Manager	
Sex	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The NFF does not differentiate by gender		Lisa Potts, Finance Manager	
Sexual Orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Lisa Potts, Finance Manager	
Religion or Belief	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The NFF is applied to all schools consistently, including faith schools.		Lisa Potts, Finance Manager	

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 checked="" type="checkbox"/>	<input type="checkbox"/>	Sparsity factor		Lisa Potts, Finance Manager	
Areas of deprivation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deprivation factor		Lisa Potts, Finance Manager	
Displaced communities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mobility factor		Lisa Potts, Finance Manager	
Care experienced people	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Lisa Potts, Finance Manager	
The Armed Forces Community	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mobility factor		Lisa Potts, Finance Manager	

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	10.11.25
Person Responsible for Review	Lisa Potts
Authorised By	

De-delegation, Education Functions and Health and Safety Service Proposals 2026/27

Report being considered by: Schools' Forum

Date of Meeting: 1st December 2025

Report Author: Lisa Potts

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

1. Purpose of the Report

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

2. Recommendation(s)

- 2.1 De-delegation of Promoting Inclusive Practice Service (PIPS) is voted on separately as a de-delegated service.
- 2.2 Maintained primary, secondary, special, nursery and PRU heads (as applicable) to agree the De-delegations and Education Functions as set out under 4.5
- 2.3 Maintained primary, secondary, special, nursery and PRU heads (as applicable) to agree the Health and Safety Service as set out in Table 5.

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			

4. Executive Summary

- 4.1 De-delegated services are for maintained schools only. Funding must be allocated through the formula but can be passed back, or de-delegated for maintained primary and secondary schools with schools forum approval.
- 4.2 De-delegated services consist of Promoting Independent Practice, Ethnic Minority Support, Trade Union Local Representation, Consortium of Local Education Authorities for the Provision of Science Services (CLEAPSS) and School Improvement
- 4.3 Education functions consist of the statutory and regulatory duties held by the local authority in respect of maintained schools.
- 4.4 The Health and Safety service provides a compliance, advice and training role for schools.
- 4.5 A summary of the costs proposed for 2026/27 are shown below:

	2026/27 Primary Budget £	Agreed by HFG	2026/27 Secondary Budget £	Agreed by HFG	2026/27 Early Years & High Needs Budgets £	Agreed by HFG
Trade Union Representation	£64,042		£15,349		£2,119	
CLEARPSS	£1,858		£945		£48*	
Education Functions	£126,712		£30,369		£4,192	

*special schools only

Issue Identification

- 4.6 The schools funding regulations for 2026/27 have not yet been published, but we have assumed similar arrangements for de-delegation of the cost of these services will apply for 2026/27.

Consultation and Engagement

- 4.7 Consultation with the Service Managers who run the services funded by de-delegations.

Monitoring and Evaluation

- 4.8 These budgets will be monitored as part of the quarterly budget monitoring cycle through the Heads Funding Group and Schools Forum meetings

5. Introduction and background

- 5.1 This report sets out the details, cost, and charges to schools of the services on which maintained school representatives are required to vote (on an annual basis).
- 5.2 De-delegated services consist of Behaviour Support, Ethnic Minority Support, Trade Union Local Representation, Consortium of Local Education Authorities for the Provision of Science Services (CLEAPSS) and School Improvement
- 5.3 Education functions consist of the statutory and regulatory duties held by the local authority in respect of maintained schools.

6. Supporting Information on De-delegated services

- 6.1 De-delegated services are for maintained schools only. Funding must be allocated through the formula but can be passed back, or de-delegated for maintained primary and secondary schools with schools forum approval.
- 6.2 Funds cannot be de-delegated from Special and Nursery Schools and PRUs for these services, but those schools will have the option to buy back these services at a cost based on the same amount per pupil as for primary and secondary schools. Academies may also be given the option to buy into the service.
- 6.3 The schools funding regulations for 2026/27 have not yet been published, but we have assumed similar arrangements for de-delegation of the cost of these services will apply for 2026/27.
- 6.4 For 2026/27 there are a number of schools who are converting to academy status, who will not form part of the de-delegation. In order to maintain services, and reflect the increasing needs being supported, funding has been protected. The effect of this will be to lead to an increase in costs per school.
- 6.5 Primary and secondary school representatives are required to recommend to Schools Forum on whether each service is to be de-delegated or not. The services below were de-delegated in 2025/26 and are proposed to be de-delegated in 2026/27:

Primary and Secondary only:

- Trade Union Local Representation
- CLEAPSS

- 6.6 Ethnic Minority and Traveller Achievement Service will be delivered in a different way in 2026/27 and will not be de-delegated. School Improvement will be funded from Council funds from 2026/27 and not de-delegation

7. Trade Union Representation

- 7.1 The detail of the service provided by Trade Union representatives to schools is set out in Appendix B.
- 7.2 Table 1 shows the budget and unit charge for the service for 2026/27 compared to 2025/26. The proposal for 2026/27 is based on the cost of 1FTE supply teacher on UPS3. The total net cost in respect of primary and secondary schools will be divided by the total number of pupils in the October 2025 census to determine a unit charge per pupil on which the de-delegated amount per school will be based on. As all schools have access to all representatives (regardless of which school they are based in), the

same unit charge will apply to both primary and secondary schools. Based on the October 2024 census the charge will be £6.55 per pupil.

TABLE 1	2025/26			2026/27		
	Number of pupils	Unit Charge per pupil	Budget	Number of pupils	Unit Charge per pupil	Budget
Maintained Primary Schools	10,678	£5.20	£55,529	9,780	£6.55	£64,042
Maintained Secondary Schools	3,389	£5.20	£17,624	2,344	£6.55	£15,349
			£73,154			£79,391

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

- 8.1 The detail of the service provided by this subscription is set out in Appendix C.
- 8.2 As the actual pricing from CLEAPSS will not be available until after the schools budget has been set, an assumption has been made on the 2025/26 fee. Any over or under spend will be recovered the following year, as in all de-delegated services. Table 2 shows the budget and unit charge for the service for 2026/27 compared to 2025/26. The unit charge includes the administration fee. Note that secondary schools will need to pay the fee relating to sixth form pupils separately as de-delegation is based on pre 16 pupils only.

TABLE 2	2025/26				2026/27			
	Number of pupils	Unit Charge per pupil	Charge per school	Budget	Number of pupils	Est Unit Charge per pupil	Est Charge per school	Estimated Budget
Maintained Primary Schools	10,678	£0.19		£2,029	9,780	£0.19		£1,858
Maintained Secondary Schools	3,389	£0.19	£250	£1,394	2,344	£0.19	£250	£1,195
				£3,423				£3,054

9. Education Functions for Maintained Schools

- 9.1 Education responsibilities held by local authorities for all schools are funded from the Central Schools Services Block of the DSG. Education functions held by local authorities for maintained schools only can be funded from maintained schools budget shares and de-delegated, with agreement of the maintained schools members of schools forums.
- 9.2 Education functions consist of the statutory and regulatory duties held by the local authority in respect of maintained schools. These consist of Accountancy, Internal Audit and Pension scheme administration. The Accountancy, audit and pension administration services are described in appendix D.
- 9.3 Representatives of all maintained schools (including Special and Nursery Schools and PRUs) are required to recommend to Schools Forum whether or not these services should be funded from maintained school budget shares and de-delegated for 2026/27:

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

9.5 Table 3 shows the budget and estimated unit charges for these services in 2026/27 compared to 2025/26. The total cost will be divided by the total numbers of pupils in the October 2025 census to determine a unit charge per pupil on which the de-delegated amount per school will be based. The same unit charges will apply to both primary and secondary schools. Based on the October 2024 census the charge will be £12.96 per pupil.

TABLE 3	2025/26		2026/27				
	Charge per Pupil	Budget	Unit Charge per pupil	Total Budget	Primary Budget	Secondary Budget	Budget for Nursery, Special Schools and PRUs
Accountancy	£4.04	£56,784	£4.87	£60,670	£47,668	£11,425	£1,577
Audit	£3.75	£52,688	£4.52	£56,306	£44,240	£10,603	£1,463
Pension Scheme Administration	£2.88	£40,462	£3.56	£44,297	£38,804	£8,342	£1,151
Total Education Functions	£10.66	£149,934	£12.96	£161,273	£126,712	£30,369	£4,192

9.6 Table 4 summarises the de-delegations and education functions which are proposed for 2026/27:

TABLE 4	2026/27 Primary Budget £	Agreed by HFG	2026/27 Secondary Budget £	Agreed by HFG	2026/27 Early Years & High Needs Budgets £	Agreed by HFG
Trade Union Representation	£64,042		£15,349		£2,119	n/a
CLEAPSS	£1,858		£945		£48*	n/a
Education Functions	£126,712		£30,369		£4,192	

*Special schools only

10. Health and Safety Service to Schools

10.1 As the Council is the employer and therefore the principal legal duty holder (notwithstanding any delegated responsibilities to a schools, Head Teachers and Governors) in relation to health and safety, it makes sense to ensure an adequate, effective and efficient health and safety service is provided to all Local Authority maintained schools and a buy-back option offered to non-maintained schools.

10.2 The Health and Safety Team provide a compliance, advice and training role for schools and the Team continue to be heavily involved in assisting schools developing and reviewing covid secure arrangements, plans and risk assessments.

10.3 Following a decision to change the way the service operated in 2020/21, for the last year all maintained schools have had the Level Two (Enhanced) service. This is a comprehensive health and safety support service and covers all aspects of health and safety management and support including necessary health and safety training.

10.4 It is proposed to provide the full schools health and safety service to all maintained schools, continuing on from the previous year. This will meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation.

10.5 Schools will pay a graduated fee based on pupil numbers for the Level 1 element of the service and a top up cost to cover the combined service. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.

10.6 A buy-back option would continue to be offered to schools such as academy and independent schools. Income generated from buy-back services would be invested in the service or offset to reduce costs for the schools in the collective agreement.

10.7 Table 5 below shows the 2026/27 cost if all Local Authority maintained schools, Voluntary Controlled, Voluntary Aided and special schools agree to one equal service.

Table 5

Pupil No's	Band A 0-60	Band B 61 - 100	Band C 101-200	Band D 201-300	Band E 301- 465	Band F +466	Band G Secondary
24/25	£881.92	£1433.12	£1763.84	£2204.80	£2866.24	£6.24 Per Pupil	£6.24 Per Pupil
25/26	£917.20	£1,490.44	£1,834.39	£2,292.89	£2,980.89	£6.40 per Pupil	£6.40 per Pupil

Pupil No's	Band A 0-50	Band B 51 - 100	Band C 101 - 175	Band D 176 - 250	Band E 251 - 325	Band F 326 – 447	Band G 448+	Band H Secondary
26/27	£972.23	£1,579.87	£1,944.46	£2,430.57	£3,159.74	£3,317.73	£7.42 per pupil	£7.42 per pupil

11. View from the Heads' Funding Group

The Heads Funding Group recommended that the proposed de-delegations go forward to the Schools' Forum on 1st December for consideration, with PIPS being voted on separately.

12. Appendices

12.1 Appendix A – De-delegations per school for 2026/27

12.2 Appendix B – Trade Union Representation Service

12.3 Appendix C – CLEAPSS Service

12.4 Appendix D – Accountancy, Audit and Pension Administration (Education Functions)

12.5 Appendix E - Health and Safety service to schools

12.6 Appendix F – Health and Safety Service 2026/27

12.7 Appendix G – Legal Duty Holders for Health & Safety

Appendix A

Indicative De-Delegations for 2026/27 - Based on October 2024 Census Data									
		De-delegations			Education functions for maintained schools				
		Promoting Inclusive Practice Service	Trade Union Representation	CLEAPSS	Statutory Accounting Functions	Internal Audit of Schools	Pension Scheme Administration	Total De-delegations and Education Functions	
Proposed Primary Delegation		£167,251	£64,042	£1,858	£47,668	£44,240	£34,804		£359,863
Proposed Secondary Delegation		£40,085	£15,349	£945	£11,425	£10,603	£8,342		£86,749
Total Proposed Delegation		£207,336	£79,391	£2,804	£59,093	£54,843	£43,146		£446,612
Estimated income from other maintained schools		£0	£2,119	£48	£1,577	£1,463	£1,151		£6,358
Total Cost of Service		£207,336	£81,510	£2,851	£60,670	£56,306	£44,297		£452,970
Cost per primary pupil		£17.10	£6.55	£0.19	£4.87	£4.52	£3.56		£37
Cost per secondary pupil		£17.10	£6.55	£0.19	£4.87	£4.52	£3.56		£37
Cost per other maintained school pupil		n/a	£6.55	£0.19	£4.87	£4.52	£3.56		£20
Fixed cost per secondary school		n/a	n/a	£250.00	n/a	n/a	n/a		£250
School	Pupil No's	EAL No's							
Aldermaston C.E. Primary School	116	4.4	1,984	760	22	565	525	413	4,268
Beedon C.E. (Controlled) Primary School	22	2.2	376	144	4	107	100	78	810
Beenham Primary School	45	14.7	770	295	9	219	204	160	1,656
Birch Copse Primary School	417	14.1	7,131	2,731	79	2,032	1,886	1,484	15,344
Bradfield C.E. Primary School	150	1.1	2,565	982	29	731	679	534	5,519
Brightwalton C.E. Aided Primary School	87	2.3	1,488	570	17	424	394	310	3,201
Brimpton C.E. Primary School	47	0.0	804	308	9	229	213	167	1,729
Bucklebury C.E. Primary School	113	2.4	1,932	740	21	551	511	402	4,158
Burghfield St Mary's C.E. Primary School	207	4.6	3,540	1,355	39	1,009	936	737	7,617
Calcot Infant School and Nursery	170	44.2	2,907	1,113	32	829	769	605	6,255
Calcot Junior School	261	22.0	4,463	1,709	50	1,272	1,181	929	9,604
Chaddleworth St Andrew's C.E. Primary School	26	0.0	445	170	5	127	118	93	957
Chieveley Primary School	171	3.5	2,924	1,120	32	833	774	609	6,292
Cold Ash St Mark's CE Primary School	203	2.4	3,472	1,329	39	989	918	722	7,470
Curridge Primary School	96	14.0	1,642	629	18	468	434	342	3,532
Downsway Primary School	212	4.7	3,625	1,388	40	1,033	959	754	7,801
Enborne C.E. Primary School	81	4.7	1,385	530	15	395	366	288	2,980
Englefield C.E. Primary School	110	4.7	1,881	720	21	536	498	391	4,048
Falkland Primary School	411	18.7	7,029	2,691	78	2,003	1,859	1,463	15,123
Garland Junior School	185	10.2	3,161	1,211	35	902	837	658	6,807
Hampstead Norreys C.E. Primary School	49	1.1	838	321	9	239	222	174	1,803
Hermitage Primary School	172	5.7	2,941	1,126	33	838	778	612	6,329
Hungerford Primary School	328	10.5	5,609	2,148	62	1,599	1,484	1,167	12,069
The Isleys Primary School	49	3.4	838	321	9	239	222	174	1,803
Inkpen Primary School	37	6.3	633	242	7	180	167	132	1,361
Kennet Valley Primary School	199	22.1	3,403	1,303	38	970	900	708	7,322
Kintbury St Mary's C.E. Primary School	122	6.7	2,086	799	23	595	552	434	4,489
Long Lane Primary School	207	14.0	3,540	1,355	39	1,009	936	737	7,617
Mortimer St Mary's C.E. Junior School	165	8.0	2,822	1,080	31	804	746	587	6,071
Mortimer St John's C.E. Infant School	235	9.1	4,019	1,539	45	1,145	1,063	836	8,647
Mrs Bland's Infant School	126	37.4	2,155	825	24	614	570	448	4,636
Pangbourne Primary School	136	6.1	2,322	891	26	663	615	484	5,004
Parsons Down Infant School	90	18.8	1,539	589	17	439	407	320	3,312
Parsons Down Junior School	167	7.1	2,856	1,094	32	814	755	594	6,145
Purley CoE Primary School	81	3.6	1,385	530	15	395	366	288	2,980
Robert Sandilands Primary School and Nursery	211	23.2	3,608	1,382	40	1,028	954	751	7,764
Shaw-cum-Donnington C.E. Primary School	91	7.8	1,556	596	17	444	412	324	3,348
Shefford C.E. Primary School	52	1.1	889	341	10	253	235	185	1,913
Springfield Primary School	300	20.8	5,130	1,964	57	1,462	1,357	1,068	11,039
Spurcroft Primary School	368	25.6	6,293	2,410	70	1,794	1,665	1,310	13,541
St Finian's Catholic Primary School	203	8.2	3,472	1,329	39	989	918	722	7,470
St John the Evangelist CoE Infant and Nursery School	171	55.5	2,924	1,120	32	833	774	609	6,292
St Joseph's Catholic Primary School	213	83.6	3,643	1,395	40	1,038	963	758	7,838
St Nicolas C.E. Junior School	255	19.0	4,363	1,670	48	1,243	1,153	907	9,383
St Paul's Catholic Primary School	296	46.3	5,062	1,938	56	1,443	1,339	1,053	10,892
Stockcross C.E. School	80	3.2	1,368	524	15	390	362	285	2,944
Streatley C.E. Voluntary Controlled School	98	3.4	1,676	642	19	478	443	349	3,606
Sulhamstead and Ulton Nervet School	99	1.2	1,693	648	19	483	448	352	3,643
Thatcham Park CoE Primary	318	21.5	5,438	2,082	60	1,550	1,438	1,132	11,701
Theale C.E. Primary School	308	10.5	5,267	2,017	59	1,501	1,393	1,096	11,333
Welford and Wickham C.E. Primary School	62	1.1	1,060	406	12	302	280	221	2,281
Westwood Farm Infant School	178	22.2	3,044	1,166	34	868	805	633	6,550
Westwood Farm Junior School	239	11.0	4,087	1,565	45	1,165	1,081	851	8,794
The Willows Primary School	339	22.5	5,797	2,220	64	1,652	1,533	1,206	12,474
The Winchcombe School	414	62.7	7,080	2,711	79	2,018	1,873	1,473	15,233
Woolhampton C.E. Primary School	102	0.0	1,744	668	19	497	461	363	3,753
Yattendon C.E. Primary School	90	1.2	1,539	589	17	439	407	320	3,312
Little Heath School	1,313	13.1	22,454	8,598	499	6,400	5,939	4,673	48,563
The Willink School	1,031	15.0	17,631	6,751	446	5,025	4,664	3,669	38,186
PRIMARY TOTAL	9,780	786.56	167,251	64,042	1,858	47,668	44,240	34,804	359,863
SECONDARY TOTAL	2,344	28.10	40,085	15,349	945	11,425	10,603	8,342	86,749
TOTAL ALL PRIMARY AND SECONDARY SCHOOLS	12,124	814.7	207,336	79,391	2,804	59,093	54,843	43,146	446,612
Other Maintained Schools									0
Hungerford Nursery	36.92		n/a	242	n/a	180	167	131	720
Victoria Park Nursery	34.6		n/a	227	n/a	169	157	123	675
Total within Early Years Block			0	468	0	349	324	255	1,395
The Castle Special School	158		n/a	1,035	30	770	715	562	3,112
i-college	94		n/a	616	18	458	425	335	1,851
Total Within High Needs Block			0	1,650	48	1,228	1,140	897	4,963
Total for All Other Maintained Schools	323.52	0.0		2,119	48	1,577	1,463	1,151	6,358
Total all Maintained Schools	12,448	815	207,336	81,510	2,851	60,670	56,306	44,297	452,970

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2026-27

Trade Union Representation Service

Outline of Proposed Service 2026/27

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

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

What union officers do

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

Individual casework issues

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

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

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

Collective Issues

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

This school year has seen an increase in the number of school restructurings accompanied by the risk of redundancy, as school budgets come under increasing pressure. The redundancy procedure is complex and often involves multiple meetings. The threat of redundancy can quickly undermine morale in a school and often the role of union officers is to reassure and support employees as well as ensuring that correct procedures are followed.

Proposed Cost of Delivery in 2026/27

The following table summarises the proposed cost of the service for 2026/27, compared to 2025/26. It is based on engaging a representative from each of the unions:

	2025/26 £	Proposed UPS3 2026/27 £
Total Direct Costs	£68,884	£74,100
Support Service Recharges	£6,888	£7,410
Total Cost	£75,772	£81,510
Income from Nursery and Special Schools and PRUs	£2,520	£2,119
Cost to Primary and Secondary Schools	£73,252	£79,391

The proposed budget for 2026/27 is based on:

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

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

Method of charging in 2026/27

The total cost of the service will be divided by the total number of pupils recorded in the October 2025 census to arrive at a per pupil amount for charging purposes. Using October 2024 census data, this would equate to £6.55 per primary and secondary pupil. Appendix A of the main report shows the indicative total amount per school. Academies and other schools may choose to buy into the service at the same per pupil rate (this would provide funding for additional hours).

Other Options which *may* be considered

It should be noted that once a decision has been made to discontinue pooling arrangements, it would be almost impossible to reverse that decision at a later date. Therefore the HFG and SF need to be aware that a decision to cease pooling arrangements for this budget would be permanent.

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

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2026-27

CLEAPSS Service

Outline of Proposed Service 2026/27

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

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

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

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

Benefits of Service

CLEAPSS covers:

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

CLEAPSS provides:

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

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

Costs and Method of charging for 2026/27

CLEAPSS set the pricing each year in February/March for the financial year April to March ahead. In 2025/26 the charge to schools was 19 pence per pupil including administration costs. For secondary schools who require the service of a Radiation Protection Officer (delivered by WBC Health & Safety Team) and a Radiation Protection Adviser (delivered by CLEAPPS) there are additional costs of £250 per annum for the Radiation Protection Officer for the Radiation Protection Adviser.

The proposal for 2026/27 is to keep the same rate per pupil to 19 pence per pupil.

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

The charges for the RPA and RPO service will increase to £270 to cover increased cost of RPA and expenses.

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

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

School	Cost through local authority per pupil	Cost directly per pupil (min 200 pupils/ 350 secondary)	Radiation Protection Advisor	Radiation Protection Officer
Nursery	19p	26p	N/A	N/A
Primary	19p	26p	N/A	N/A
Secondary	19p	34p	£65	£205
Special	19p	34/26p	N/A	N/A
PRU	19p	34/26p	N/A	N/A
Primary Academy	19p	26p	N/A	N/A
Secondary Academy	19p	34p	£65	£205
Incorporated colleges	19p	34p	£65	£205

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2026-27

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

Accountancy (Statutory Functions)

Description of Duties:

Consolidation of school accounts into Council's year end statement of accounts.

Overview of school budget submissions & budget monitoring reports.

Monitoring of schools in financial difficulty/deficit.

Monitoring adherence to Scheme for Financing Schools.

Returns to Central Government – CFR, CFO grants return.

Administration of grants & other funding to maintained schools eg. PPG, budget allocations & adjustments.

Budgeting and accounting functions relating to maintained schools (Sch 2, 74)

Cost: £60,670

0.37 FTE Accountants; 0.38 FTE Senior Accountant; 0.14 FTE Finance Manager

Total FTE 0.89

Pension Scheme Administration

Description of Duties:

Administration of Teachers and Local Government pension schemes in relation to staff working in maintained schools:

Amending and updating employee records in relation to pensions

Responding to queries from employees in relation to pensions

Completion of statutory monthly returns to Teachers Pensions and Local Government pension scheme, including service and pay calculations.

Cost: £44,297

1.0 FTE Pensions Assistant
Internal Audit of Schools – Statutory Requirements
Description of Duties: Annual internal audit of maintained schools according to level of risk - circa 10 schools are audited per year. Each audit takes on average 7 days. The audit covers Governance; financial planning and management; financial policy, processes and records; benchmarking and value for money; school fund, SFVS. We also carry out follow-up reviews for those schools that have a weak or very weak audit report opinion. There is provision for adhoc advice to schools/issuing the Anti Fraud Advisory Bulletins and the investigation of any financial irregularities. We also monitor compliance with submitting the SFVS returns. We have also included an element of time for the planning and monitoring of the school visit programme, and liaising with Accountancy /governor support etc on queries when they arise.
Cost: £56,306
0.65 FTE Senior Auditor; 0.09 FTE Audit Manager

Proposed Cost of Delivery in 2026/27

The following table summarises the proposed cost of the service for 2026/27, compared to 2025/26.

	2024/25 £	2025/26 £	2026/27 Proposed £
Accountancy	54,607	58,817	60,670
Audit	52,781	54,574	56,306
Pension Scheme Admin	38,797	41,910	44,297
Total Cost	146,185	155,301	161,273
Less income from Special and Nursery Schools and PRUs	4,460	5,165	£4,192
Amount to be De-Delegated	141,725	150,136	£157,081

Method of charging in 2026/27

The total net cost of the service will be divided by the total number of pupils recorded in the October 2025 census to arrive at a per pupil amount for charging purposes. Using October 2024 census data, this would equate to £12.96 per pupil. Appendix A of the main report shows the indicative total amount per school.

Other Options which *may* be considered

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

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

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2026-27

Statutory and Regulatory Duties – Health and Safety

1. Introduction

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

2. Background and Legislative Context

2.1 The principal legislation in the United Kingdom for health and safety is the Health and Safety at Work etc. Act 1974, there is also a considerable amount of health and safety legislation under the Health and Safety at Work Etc Act 1974 including the Management of Health and Safety at Work Regulations etc.

2.2 The Management of Health and Safety at Work Regulations set out that every employer shall appoint one or more competent persons to assist him in undertaking the measures s/he needs to take to comply with the requirements imposed by the relevant statutory provisions.

2.3 The regulations state that the employer shall ensure that the number of competent persons appointed, the time available for them to fulfil their functions and the means at their disposal are adequate having regard to the size of the undertaking, the risks to which employees are exposed and the distribution of those risks throughout the organisation. It should be noted that the regulations do not suggest any limit or scope to the competent advice or how it should be delivered practically.

2.4 The regulations also state that where there is a competent person in the employer's employment, that person shall be appointed in preference to a competent person not in his employment.

2.5 The duties imposed by the health and safety at work Act 1974 and associated regulations apply to the Council as an employer and it would also apply to the Council in relation to Local Authority maintained schools as the Council is the employer.

2.6 In the case of Foundation and Voluntary Aided schools the Governors are the employer. In independent schools and Academies the Governors or the Academy Trust are the employers.

2.7 The Council also has the general "duty to educate", even where the Governors or an Academy Trust are the employer, there could be some limited involvement for the Council if a serious incident were to occur. See Appendix B for further information on the legal duty holders.

3. The Council's Health & Safety Support Service to Schools

3.1 The Council offers a health and safety support service to West Berkshire schools in line with the service level agreement offered to all schools included in the de-delegation system.

3.2 Following a decision to change the way the service operated in 2020/2021 all maintained schools have had the Level Two (Enhanced) service. This is a comprehensive health and safety support service and covers all aspects of health and safety management including necessary health and safety training, health and safety compliance and advice for schools.

3.3 As the Council is the employer and therefore a legal duty holder (not notwithstanding any delegated responsibilities to a schools, Head Teachers and Governors) in relation to health and safety, it makes sense to ensure an adequate and effective health and safety service is provided to Local Authority maintained schools and then a buy-back option offered to non-maintained schools.

4. Proposal

4.1 The schools health and safety service would be provided to all maintained schools, continuing on from the previous year. This will meet the requirements of the employer under the Health and Safety at Work etc. Act 1974 and the Management of Health and Safety at Work Regulations and other related legislation.

4.2 Schools will pay a graduated fee based on pupil numbers. All maintained schools will need to agree to be part of this collective agreement to equitably fund the service.

4.3 A buy-back option would continue to be offered to schools such as academy and independent schools. Income generated from buy-back services would be invested in the service or offset to reduce costs for the schools in the collective agreement.

4.4 Table 1 below shows the 26/27 cost if all Local Authority maintained schools, Voluntary Controlled, Voluntary Aided and special schools agree to one equal service. Due to rising costs it has been necessary to increase the cost of the service Bands A-F by 6%.

Table 1

Pupil No's	Band A 0-60	Band B 61 - 100	Band C 101-200	Band D 201-300	Band E 301- 465	Band F +466	Band G Secondary
24/25	£881.92	£1433.12	£1763.84	£2204.80	£2866.24	£6.24 Per Pupil	£6.24 Per Pupil
25/26	£917.20	£1,490.44	£1,834.39	£2,292.89	£2,980.89	£6.40 per Pupil	£6.40 per Pupil

Pupil No's	Band A 0-50	Band B 51 - 100	Band C 101 - 175	Band D 176 - 250	Band E 251 - 325	Band F 326 – 447	Band G 448+	Band H Secondary
26/27	£972.23	£1,579.87	£1,944.46	£2,430.57	£3,159.74	£3,317.73	£7.42 per pupil	£7.42 per pupil

There are no discounts based on federated schools. However, schools who operate on the same site would pay one fee based on a combined pupil total up to 447 pupils when it will be charged per pupil. Maintained nursery schools would pay Band A due to the part time nature of their pupils.

Table 2 below shows the cost of providing the enhanced service:

Table 2	2026/27 Proposed £
Staffing Costs	125,750
Other Costs	11,610
Support Service Recharges	13,740
Total Cost	151,100
De-delegated basic income @ £7.42 per pupil	-92,320
Remainder cost to be met by all Maintained Primary and Secondary Schools via a top up to support the delivery of the Health & Safety Service.	58,780

5. Recommendation

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

6. Conclusion

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

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

Appendix F

Health and Safety Service 2026/27

The Health and Safety Team are part of Finance and Property Service in the Resources Directorate. Our address is: Council Offices, Market Street, Newbury RG14 5LD

Overview of Service

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

The Schools Health and Safety Team also work on policy development and effective implementation, user friendly guidance and information, support in completing risk assessments, a range of health and safety training and health and safety newsletters. A summary of the service can be found in Table 3 below

Schools Health & Safety Audit

The Schools Health & Safety Audit is designed to measure levels of compliance with legislation and best practice. The associated action plan will help you prioritise your improvements.

The assessment is conducted using a process of objective evidence gathering including a review of safety documentation, discussions with relevant managers and staff and a tour/inspection of the site.

From September 2025 the way the health and safety team audit schools will change. Instead of conducting a full audit, at a risk assessed interval (between 1 & 4 years), the audit will be broken down into 4 sections. Each section will be audited and scored across a number of separate visits, and the next visit frequency for each section will depend on that section's score.

Schools will not receive an overall outcome, each section will be scored and shown on the report with the most recent scores for each section, to give an overview of health and safety management on the site.

The questions will remain similar and we will let schools know in advance which section/sections we would auditing prior to the visit. It is anticipated that the visits will be between 1-3 hours and most schools will receive at least one audit visit per year.

In addition, for secondary schools, it is intended to include additional visits to audit the controls in higher risk departments (Science, D&T/Art/Textiles/Food Tech, Drama, PE).

The audit sections are detailed below (Table 1) along with the frequency for reinspection (Table 2).

Table 1		
Section A	Governance, Leadership, Communication and Competence	
Section B	First Aid, Accidents, Play Equipment, Security, General site Condition	
Section C	Fire, Legionella and Asbestos	
Section D	Working at Height, Manual Handling, Managing Contractors, COSHH, Compliance, Kitchens, Pools & Transport (if applicable)	

Table 2		
Score	Outcome	Frequency between audits
91% +	Excellent	Up to 4 years
80-90%	Good	Up to 3 years
55-79%	Improvement required	Up to 2 years
Up to 54%	Urgent improvements required	Up to 1 Year

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

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

	Your advisor can also provide fire awareness/fire marshal training to school staff on request.
10. Asbestos Management	<p>Schools can request a site visit to complete a condition check of asbestos containing materials (ACM) with their Health and Safety Advisor.</p> <p>Your advisor can also review:</p> <p>The Asbestos Management Plan The Asbestos Register The Asbestos Survey</p> <p>Additionally any asbestos related risk assessment you may have in place will be reviewed to ensure it is correct and relevant.</p> <p>Your advisor can also provide tool-box talks to your staff regarding ACMs on site and highlight their responsibilities in respect of managing ACMs.</p>
11. Legionella Management	<p>Schools can request a site visit to complete a review of the legionella risk assessment with their Health and Safety Advisor.</p> <p>The advisor will also check that the school are working within the written scheme suggested and in line with the recommendations of the legionella risk assessment.</p>
12. Playground Equipment	<p>Schools can request a site visit to complete a playground equipment inspection with their Health and Safety Advisor. This will be a guided check to ensure staff are confident with what should be checked, what should be recorded and what action to take.</p> <p>We can also review the playground equipment risk assessment with the school to ensure it is suitable and sufficient.</p> <p>We can also provide on-site training and support to staff on request.</p>
13. First Aid	<p>Schools can request support and assistance to ensure the school's first aid needs assessments are in place and up to date and an appropriate number of staff are identified and trained to deliver first aid.</p>
14. Accident / Incident investigation and enforcement action	<p>Schools can request on-site support and advice from your named and dedicated Health and Safety Adviser during an accident investigation for a serious accident or enforcement action by an enforcing authority such as the Health and Safety Executive.</p>
15. Accident Reporting & Recording System	<p>The Councils Accident Reporting & Recording System is provided to all schools to allow them to record and monitor accidents/incidents.</p>

School responsibilities

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

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

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

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

West Berkshire Council Schools Health and Safety Team

The schools Health and Safety Team is made up of two Senior Schools Health and Safety Advisors and a Health and Safety Manager who also manages Corporate Health and Safety, and a Technical Compliance Officer. To discuss any aspect of the Health & Safety Service please contact: schoolshealthandsafety@westberks.gov.uk

Mike Lindenburn - Health & Safety Manager

mike.lindenburn@westberks.gov.uk 07901 114627

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

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

Alice Pye - Senior Health & Safety Advisor (Schools)

alice.pye1@westberks.gov.uk 07775 013072

Alice has over 15 years' experience as an Environmental Health Officer which included health and safety auditing and enforcement as well as accident investigations, housing inspections and managing nuisance complaints. She is a member of the Chartered institute for Environmental Health (CIEH) and is EHRB registered, she also holds NEBOSH, (BIOH) Asbestos Specialist S301, BOHS P901 Legionella Management and has completed the RoSPA Operational playground inspection course.

Caroline Pooley - Senior Health & Safety Advisor (Schools)

caroline.pooley1@westberks.gov.uk

Caroline is an experienced and NEBOSH-qualified health and safety professional with a proven track record of leading teams, driving health and safety strategy, and delivering regulatory and operational services across educational and healthcare environments.

Catherine Henderson – Technical Compliance Officer

Catherine.henderson1@westberks.gov.uk 07881 230466

Catherine is our Technical Compliance Officer, overseeing all asbestos, legionella and fire safety for schools and corporate sites. She has many years' experience as an Environmental Health Practitioner working on H&S, food safety and environmental protection enforcement, as well as infectious disease control. She has also worked extensively for a large multi-national retail & distribution company covering all aspects of health & safety and trading standards, and as regional H&S Manager for the UK (South) for a national hospitality chain. As well as this wealth of experience, she has also had times working as a TA in a

complex needs resource base (including teaching Braille) and as an NCT antenatal practitioner.

Appendix G

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

Central Schools' Services Block Budget 2026/27

Report being considered by: Schools' Forum

Date of Meeting: 1st December 2025

Report Author:

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

1. Purpose of the Report

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

2. Recommendation

- 2.1 Decision will be required at the January Schools Forum when we have confirmed allocations for all blocks within the DSG.

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		

4. Executive Summary

- 4.1 The CSSB covers funding allocated to Local Authorities (LAs) to carry out central functions on behalf of pupils in state-funded maintained schools and academies in England. All the services funded by this block are statutory and have to be carried out.
- 4.2 To date, there has been no indication of the value of the grant to be received in 2026/27. The DFE are due to communicate an update later in November 2025.
- 4.3 The following table shows the budget requirement for the services that fall within the Central Schools Services Block for 2026/27 compared to 2025/26.

	Central Schools Services Block (CSSB)	2025/26 Budget	2026/27 Budget Requirement	Increase/Decrease	Change
		£	£	£	%
Budget Requirement:					
1	School Admissions	239,336	240,964	1,628	1%
2	National Copyright Licences	184,097	203,756	19,659	11%
3	Servicing of Schools Forum	55,158	55,774	616	1%
4	Education Welfare	246,411	260,004	13,593	6%
5	Support for Inclusion	-	65,470	65,470	
6	Statutory & Regulatory Duties:				
a	Provision of Education Data	187,008	194,638	7,630	4%
b	Finance Support for the Education Service	88,005	92,385	4,380	5%
c	Strategic Planning of the Education Service	67,450	71,280	3,830	6%
Total Budget Requirement		1,067,465	1,184,271	116,806	10.9%

Issue Identification

- 4.4 Historically, the Department for Education (DfE) has provided an indicative allocation for the Central School Services Block (CSSB). At present, no information has been received for 2026/27. While we have reviewed historical allocations to identify patterns, recent years have not shown any pattern. This has made it difficult to estimate the grant level for this block.

Consultation and Engagement

- 4.5 Consultation with the Service Managers who run the services funded by the Central School Services Block.

Monitoring and Evaluation

4.6 These budgets will be monitored as part of the quarterly budget monitoring cycle through the Heads Funding Group and Schools Forum meetings

5. Introduction and background

5.1 The CSSB covers funding allocated to Local Authorities (LAs) to carry out central functions on behalf of pupils in state-funded maintained schools and academies in England. All the services funded by this block are statutory and have to be carried out.

5.2 There hasn't yet been any information from the DFE in relation to what level this grant will be set at for the block

5.3 The following table shows the budget requirement for the services that fall within the Central Schools Services Block for 2026/27 compared to 2025/26.

	Central Schools Services Block (CSSB)	2025/26 Budget	2026/27 Budget Requirement	Increase/Decrease	Change
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1	School Admissions	239,336	240,964	1,628	1%
2	National Copyright Licences	184,097	203,756	19,659	11%
3	Servicing of Schools Forum	55,158	55,774	616	1%
4	Education Welfare	246,411	260,004	13,593	6%
5	Support for Inclusion	-	65,470	65,470	
6	Statutory & Regulatory Duties:				
a	Provision of Education Data	187,008	194,638	7,630	4%
b	Finance Support for the Education Service	88,005	92,385	4,380	5%
c	Strategic Planning of the Education Service	67,450	71,280	3,830	6%
Total Budget Requirement		1,067,465	1,184,271	116,806	10.9%

5.4 For 2026/27, staff on council pay grades have been budgeted at 3.5% pay award, which is where the majority of the increased costs have come from. Other increases relate to the cost of the Capita system and the addition of support for inclusion

5.5 The cost of copyright licence for schools is determined by the relevant national agencies. Details of all the other services included in the Central Schools Services Block (including a breakdown of costs) is given in Appendix A.

6. Conclusion

6.1 The expected costs for the Central Schools Services Block for 2026/27 is £1,184,271, which is a £116,806 increase on 2025/26. There will be an update provided once the grant value is known.

7. View from the Heads' Funding Group

7.1 Noted

8. Appendices

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

Appendix A

	Number of Posts	% Charged to CSSB	2026/27 £
School Admissions			
Description of Statutory Duties covered			
Administration of admissions process for maintained schools and academies			
Staffing Structure			
Admissions and Transport Manager	1.00	80%	
Admissions Officers	2.50	80%	
Admissions and Transport Officer	1.00	40%	
Breakdown of Costs			
Staff salary costs			171,430
Employee Expenses & recharge of appeals costs			18,700
Supplies and Services			1,320
Capita One recharge			24,329
Support Service Recharges			25,185
TOTAL ELIGIBLE EXPENDITURE FOR ADMISSIONS			240,964
	Number of Posts	% Charged to CSSB	2026/27 £
Servicing the Schools Forum			
Description of Statutory Duties covered			
Setting agendas, minute taking, co-ordination and distribution of papers for Schools Forum and its sub groups			
Staffing Structure			
Service Director Education	1.00	10.00%	
Schools Finance Team	2.00	10.00%	
Schools Forum Clerk			
Breakdown of Costs			
Staff salary costs			49,720
Room hire, consumables and members expenses			1,610
Support Service Recharges			4,444
TOTAL ELIGIBLE EXPENDITURE FOR SERVICING THE SCHOOLS FORUM			55,774

Central Schools' Services Block Budget 2026/27

	Number of Posts	% Charged to CSSB	2026/27 £
Education Welfare			
<u>Description of Statutory Duties covered</u>			
Promote regular attendance by registered pupils at schools in West Berkshire and reduce the number and duration of absences			
Develop a strategic approach to improving attendance across the district			
Work with schools to support pupils who are persistently absent			
Progress cases to court where appropriate. Maintain up to date knowledge of legal processes and proceedings so that culpable parents are prosecuted or issued with a fixed penalty notice i.e. Take legal action			
The Education Attendance Team (Education Welfare Service) also have responsibility for Children Missing Education, Elective Home Education and Child Employment which includes:			
*maintaining records and conduct annual reviews of EHE children			
*provide clear written guidance to parents about their responsibilities of EHE children			
*ensure risk assessments carried out for Child Employment, including site visits & issuing child work permits and performance licences			
<u>Staffing Structure</u>			
Principal Education Welfare and Safeguarding Officer	1.00	40%	
Senior Education Welfare Officer	0.80	90%	
Education Welfare Officers	2.36	100%	
<u>Breakdown of Costs</u>			
Staff salary costs			217,149
Employee expenses/car allowances			4,900
Other non staffing costs			15,380
Income from fines			-19,350
Capita One Recharges			10,814
Support Service Recharges			31,111
TOTAL ELIGIBLE EXPENDITURE FOR EDUCATION WELFARE			260,004
	Number of Posts	% Charged to CSSB	2026/27 £
Support for Inclusion			
<u>Description of Statutory Duties covered</u>			
The local authority must arrange suitable full-time education for the pupil to begin from the sixth school day after the date of the statement.			
Where a pupil has an EHCP, the local authority may need to review the plan or reassess the child's needs, in consultation with the parents.			
Maintain a register of pupils who have been excluded			
Organise the IRP within the legal time frame, ensuring the exclusion is lawful, reasonable and fair.			
<u>Staffing Structure</u>			
Staffing	1.00	100%	
<u>Breakdown of Costs</u>			
Staff salary costs			65,470
TOTAL ELIGIBLE EXPENDITURE FOR PROVISION OF EDUCATION DATA			65,470

Central Schools' Services Block Budget 2026/27

	Number of Posts	% Charged to CSSB	2026/27 £
Provision of Education Data			
Description of Statutory Duties covered			
Statutory returns to DfE			
Data analysis and reporting e.g. Exam results, performance			
School census administration and reports			
Staffing Structure			
Staffing	2.00	75%	
Breakdown of Costs			
Staff salary costs			95,950
Capita One recharge			85,355
Support Service Recharges			13,333
TOTAL ELIGIBLE EXPENDITURE FOR PROVISION OF EDUCATION DATA			194,638
	Number of Posts	% Charged to CSSB	2026/27 £
Finance Support for the Education Service			
Description of Statutory Duties covered			
DSG services budget preparation, monitoring, and year end			
Education services budget preparation, monitoring, and year end			
School funding formula and early years funding formula			
Administration of funding allocations to all schools for early years and high needs			
Statutory returns e.g. APT, S251, CFO deployment of DSG			
Staffing Structure			
Service Lead - Financial Management, Revenues & Benefits	1.00	5%	
Education Finance Manager	0.92	15%	
Education Senior Accountant	0.61	50%	
Education Accountant	0.50	65%	
Accountant	1.00	50%	
Breakdown of Costs			
Staff salary costs			77,570
Support Service Recharges			14,815
TOTAL ELIGIBLE EXPENDITURE FOR FINANCE SUPPORT			92,385
	Number of Posts	% Charged to CSSB	2026/27 £
Strategic Planning of the Education Service			
Description of Statutory Duties covered			
Strategic planning and management of the Education service as a whole			
Staffing Structure			
Service Director Education	1.00	40%	
Other staffing	1.00	27%	
Breakdown of Costs			
Staff salary costs			71,280
TOTAL ELIGIBLE EXPENDITURE FOR PLANNING OF EDUCATION SERVICE			71,280

Early Years Budget 2025/26 - In Year Position

Report being considered by: Schools' Forum

Date of Meeting: 1st December 2025

Report Author: Lisa Potts & Beth Kelly

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

1. Purpose of the Report

- 1.1 An overview of the current Early Years Block position

2. Recommendation

- 2.1 This report is for information.

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. Executive Summary

- 3.1 The local authority receives varying levels of funding across different streams. To produce a robust forecast for the year, it is essential to understand the number of hours utilised in each of these streams so far to establish a reliable trend. However, the MRI system is currently not providing accurate reports for this data, making effective forecasting difficult.

Issue Identification

- 3.2 MRI is West Berkshire Council's software supplier of the system that collects attendance data from Early Years providers and calculates their payments of Government Funded Entitlements paid from the DSG.
- 3.3 September 2025 saw the implementation of the last tranche of childcare entitlement expansion and MRI issues have led to errors in some aspects of the funding calculations and system processing errors have led to delays in updating our reporting for EY providers and Finance reports.
- 3.4 Whilst this systems issue has caused an error with the funded hours reports for forecasting, the amounts paid to suppliers of Early Years education has only had minor errors.

Consultation and Engagement

3.5 We have consulted with the local authority IT department plus the external system provider.

Monitoring and Evaluation

3.6 This is for information only.

4. Introduction and background

MRI software issues impacting funding accuracy and data reporting.

4.1 MRI is West Berkshire Council's software supplier of the system that collects attendance data from Early Years providers and calculates their payments of Government Funded Entitlements paid from the DSG.

4.2 September 2025 saw the implementation of the last tranche of childcare entitlement expansion and MRI issues have led to errors in some aspects of the funding calculations and system processing errors have led to delays in updating our reporting for EY providers and Finance reports. For example:

- A system issue stopped us running payments to our expected timeline. Despite being chased several times, MRI took an extended time to write a script to correct the error. This left us limited time to update our required complex reports.
- Payments of Early Years Pupil Premium (EYPP) to certain providers were incorrectly calculated. Two errors have been identified; one resolved and the other still an outstanding issue with MRI, affecting the base rate that is applied to a small number of children eligible for EYPP. We are unable to confidently update our Finance reports to reflect the changes of funding and payments until the issue is resolved.

Early Years 2025/26 forecast

4.3 The local authority receives varying levels of funding across different streams. To produce a robust forecast for the year, it is essential to understand the number of hours utilised in each of these streams so far to establish a reliable trend. However, the MRI system is currently not providing accurate reports for this data, making effective forecasting difficult.

4.4 Despite these limitations, we wanted to provide a brief update to share the information currently available and outline our view of where 2025/26 appears to be heading.

Early Years Block Position -

4.5 At the end of 2024/25, the Early Years Block deficit stood at £927,956. This year-end figure was based on the assumption that £547k of grant funding would need to be returned to the DfE. However, we received confirmation during the summer that the actual amount to be returned is significantly lower, at £55k.

4.6 This adjustment has a positive impact on the overall position and will be reflected in the revised forecast for 2025/26.

Early Years Budget 2025/26 - In Year Position

Year end 24/25	£927,956
Year end adjustment (received July 25)	-£492,030
Revised deficit total	£435,926

- 4.7 We have spent time analysing the variance between the assumed and actual grant received. The difference is primarily linked to the methodology used in calculating allocations for the new funding streams, specifically those supporting working parents of two-year-olds and children aged nine months and above. These adjustments impacted the original assumptions and resulted in a significantly lower repayment figure.
- 4.8 The local authority is required to pass through 96% of the funding received to providers via their hourly rate, while the remaining 4% can be retained centrally for administrative and central costs.
- 4.9 For 2025/26, the Early Years grant is expected to be in the region of £27 million. Currently, we are not utilising the full 4% allowance for central costs, which indicates potential savings that could help reduce the overall deficit further.
- 4.10 We anticipate being able to provide a more accurate forecast once we have reliable data on the actual hours used across each funding stream.

5. Conclusion

- 5.1 The Early Years block has seen a reduction in the deficit balance from March 2025.

6. View from the Heads' Funding Group

- 6.1 As the deficit on the Early Years Block has reduced significantly, HFG have requested that officers investigate the feasibility of a block transfer from the Early Years block to High Needs, ensuring compliance with the pass-through rate.

7. Appendices

- 7.1 None

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High Needs Block (HNB) Budget 2026/27

Report being considered by: Schools' Forum

Date of Meeting: 1st December 2025

Report Author: Lisa Potts/ Vanessa Grizzle/ Melissa Perry/Emma Ferrey

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

1. Purpose of the Report

1.1 This report sets out the current financial position of the high needs budget for 2025/26 and the position as far as it can be predicted for 2026/27, including the likely shortfall.

2. Recommendation

2.1 To consider the current estimates on the High Needs Block, which will be subject to change and updated confirmation of the grant in January 2026.

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. Executive Summary

3.1 Setting a balanced budget for the High Needs Block remains a major challenge due to the rising number of high needs pupils and increasing unit costs, while place funding has remained static. The number of children with EHCPs continues to grow significantly, despite consistent thresholds being applied.

3.2 The Local Authority's statutory duties for children with SEND are effectively open ended in that if a child requires an EHC Plan it must be provided regardless of budgetary constraints.

3.3 Based on currently available data, the current position on the HNB budget for 2025-26 and 2026-27 is set out in the table below. In summary, the total budget needed in 2026-27 is **£47,242,288**. The in year overspend is predicted to be **£17,811,803** and the total cumulative overspend will be **£47,875,043**.

TABLE 1	2025/26 Budget £	2025/26 Forecast £	2026/27 Estimate £
Place Funding	7,190,603	5,010,600	4,887,992
Top Up Funding	30,161,070	30,600,070	33,834,700
PRU Funding (top ups only)	2,451,840	2,462,260	2,620,769
Other Statutory Services	2,893,880	2,806,170	3,627,198
Non Statutory Services	1,994,845	1,890,711	2,048,135
Support Service Recharges	175,072	175,072	215,493
Total Expenditure	44,867,310	42,944,883	47,234,288
HNB DSG Allocation	-30,825,286	-30,753,286	-29,430,485
0.25% Schools Block Transfer			
Clawback from schools			
In year overspend	14,042,024	12,191,597	17,803,803
HNB DSG Overspend from previous year	17,059,882	17,871,643	30,063,240
Total cumulative deficit	31,101,906	30,063,240	47,867,043

Issue Identification

3.4 Historically, the Department for Education (DfE) has provided an indicative allocation for the High Needs Block (IHNB). At present, no information has been received for 2026/27. The grant level figure shown is indicative.

Consultation and Engagement

3.5 Consultation with the Service Managers who run the services funded by the High Needs Block.

Monitoring and Evaluation

3.6 These budgets will be monitored as part of the quarterly budget monitoring cycle through the Heads Funding Group and Schools Forum meetings.

Recommended Option

3.7 This report is a draft and will be re-presented in January for further consideration.

4. Introduction and background

4.1 Setting a balanced budget for the High Needs Block remains a major challenge due to the rising number of high needs pupils and increasing unit costs, while place funding has remained static. The number of children with EHCPs continues to grow significantly, despite consistent thresholds being applied. The data below is taken from the SEN 2 returns which is published in January each year but reports on the year prior. For context, the current number of EHCPs in West Berkshire is 1863.

Year	WBC EHCP Total	% increase from 2019	National EHCP Total	% increase from 2019
2018	971	-	353,995	-
2019	1034	6.5%	390,109	10%
2020	1074	10.61%	430,697	22%
2021	1198	23.4%	473,255	34%
2022	1322	36%	517,049	46%
2023	1532	58%	575,963	63%
2024	1685	10%	638,700	63.7%

4.2 4.7% of children and young people in West Berkshire had an EHCP in 2023, up from 4.5% in 2022. This is higher than the national average (4.3%) and when compared to the Southeast (4.6%) and Statistical Neighbours (4.33%).

4.3 The demand for additional EHCPs has been intensified by the Covid pandemic which caused some children to fall further behind, leading to an increase in EHCP requests. Additionally, the pandemic has also exacerbated a pre-existing issue with rising incidence of social, emotional and mental health needs (SEMH) and Emotionally Based School Avoidance (EBSA).

4.4 Up until 2016-17, West Berkshire was setting a balanced high needs budget. Since then, the budget has been under pressure on an annual basis. A decision was made to set a deficit budget for the first time in 2016/17 and the budget has continued to be overspent each year since that time. The table below sets out the deficit HNB budgets set over the last 10 years:

Financial year	HNB Allocation	Block transfer	Total HNB Deficit Budget set	Difference between budget set and HNB allocation
16/17	-18,118,428	-858,000	21,584,180	2,607,752
17/18	-20,056,233	0	20,312,740	256,507
18/19	-19,958,537	27,000	20,041,180	109,643
19/20	-20,100,067	0	21,748,000	1,647,933
20/21	-21,691,304	-263,285	23,114,920	1,160,331
21/22	-23,631,318	-548,568	25,479,384	1,299,498
22/23	-26,282,076	-300,166	28,241,087	1,658,845
23/24	-28,495,697	0	31,587,958	3,092,261
24/25	-29,153,266	-335,047	37,408,701	7,920,388
25/26	-30,825,286	0	44,867,310	14,042,024

4.5 Pressure on the High Needs Block is a national issue, with many local authorities having significant overspends and setting deficit budgets. The 35 Local Authorities with the highest level of overspend are now part of the Government's Safety Valve Programme. While another 55 Local Authorities participated in the Delivering Better Value (DBV) Programme. There are three tranches to this programme; West Berkshire was in the third tranche. This programme has now ended.

4.6 The Local Authority's statutory duties for children with SEND are effectively open ended in that if a child requires an EHC Plan it must be provided regardless of budgetary constraints. Criteria for initiating an Education, Health and Care assessment are robustly applied by the SEN Panel (which has Headteacher representation). However, despite robust management of demand, the number of children with EHCPs continues to rise. The total number of EHCPs in January 2024 was 1534 compared to 972 in 2019, a rise of 58% in five years. The current number of EHCPs is 1863. The increase in EHCPs is largely concentrated in specialist placements rather than mainstream schools, which is the main factor driving budget pressure in the High Needs Block

4.7 The creation of more local provision for children with SEMH and autism has alleviated some pressures, as local maintained provision is more cost effective than independent and non-maintained provision. The Castle@Theale provision has twenty-four children on roll, rising to thirty-six by September 2025 and to its full capacity of forty-two by 2026. The LA has worked with The Castle@Theale School to create capacity for an additional class in September 2025. Every one of these children would have needed to be placed in a non-maintained or independent special school. The new Kennet Valley SEMH/Autism provision opened in 2024 with six children, which now has 12 from September 2025. It is expected that a further twelve place primary SEMH provision in the west of the Authority will be established as a matter of urgency based upon identified need. A sufficiency strategy has now been completed as part of the DBV programme and this will guide further investment in additional capacity.

4.8 It is critical that mainstream schools receive support to maintain more children with SEND in mainstream settings. This includes children with SEMH and autism. There has been some success in avoiding specialist placements through initiatives such as Therapeutic Thinking (now Promoting Inclusive Practice), the enhancement of the Autism Team, the creation of an EBSA Team and the Early Development and Inclusion Team (EDIT). Improved management of the budget will only happen if we are supporting our mainstream schools to meet increasing needs. The refreshed SEND Strategy for 2024-29 is proposing further measures to increase capacity in mainstream schools, and the DBV Programme has supported some initiatives to further improve inclusive practice in mainstream schools.

4.9 Tables 2, 3, 4 and 5 in Appendix A show where the predicted 2026-27 costs exceed 2025-26 budgets.

4.10 Based on currently available data, the current position on the HNB budget for 2025-26 and 2026-27 is set out in the table below. In summary, the total budget needed in 2026-27 is **£47,234,288**. The in year overspend is predicted to be **£17,803,803** and the total cumulative overspend will be **£47,867,043**.

TABLE 1	2025/26 Budget £	2025/26 Forecast £	2026/27 Estimate £
Place Funding	7,190,603	5,010,600	4,887,992
Top Up Funding	30,161,070	30,600,070	33,834,700
PRU Funding (top ups only)	2,451,840	2,462,260	2,620,769
Other Statutory Services	2,893,880	2,806,170	3,627,198
Non Statutory Services	1,994,845	1,890,711	2,048,135
Support Service Recharges	175,072	175,072	215,493
Total Expenditure	44,867,310	42,944,883	47,234,288
HNB DSG Allocation	-30,825,286	-30,753,286	-29,430,485
0.25% Schools Block Transfer			
Clawback from schools			
In year overspend	14,042,024	12,191,597	17,803,803
HNB DSG Overspend from previous year	17,059,882	17,871,643	30,063,240
Total cumulative deficit	31,101,906	30,063,240	47,867,043

4.11 Summary of budget requirement for 26/27 by cost centre

Cost Centre	Description	Proposed Budget 2026/27
90539	Special Schools Maintained	6,829,737
90548	Non WBC special schools	288,140
90554	Non WBC free schools	600,725
90617	Resource Units Maintained	725,120
90026	Resource Units Academies	1,310,324
90618	Resource Units Non WBC	48,180
90621	Mainstream Maintained	2,494,000
90622	Mainstream Academies	1,373,620
90624	Mainstream Non WBC	130,700
90575	Non Maintained Special Schools	1,218,080
90579	Independent Special Schools	13,938,950
90580	Further Education	1,743,880
90627	Disproportionate HN Pupils	272,000
90556	New SEMH Provision at Theale	2,180,371
90557	Kennet Valley Resource Base	680,875
90625	PRU Top Up Funding	1,340,190
90628	PRU EHCP SEMH Placements	1,280,579
High Needs Block: Top Up Funding Total		36,455,470
90540	Special Schools	1,540,000
90546	Special Schools - Place Funding Post 16	340,000
90584	Resourced Units - Place Funding	282,000
90552	Special Schools and PRU Teachers Pay and Pension	349,992
Top Slice	Resource Units Academies – pre16	582,000
90551	Mainstream Maintained - post 16 SEN places	48,000
Top Slice	Mainstream Academies – post 16	60,000
Top Slice	Further Education	786,000
90320	Pupil Referral Units	900,000
High Needs Block: Place Funding Total		4,887,992

90573	Education Other Than At School (EOTAS)	480,978
90574	Spot Purchase Alternative provision	453,161
90290	Sensory Impairment	302,522
90577	SEN Commissioned Provision	857,073
90565	Equipment for SEN Pupils	20,000
90295	Therapy Services	671,285
90288	Elective home Education Monitoring	100,310
90282	Medical Home Tuition	513,810
90610	Hospital Tuition	36,180
90281	SEND Strategy (DSG)	75,430
90356	Fair Access Protocol	50,000
90237	Alternative Provision Co-ordinator	66,450
90555	Language and Literacy Centres LALs	194,470
90585	Specialist Inclusion Support Service	50,000
90582	PRU Outreach Service	61,200
90280	Cognitive and Learning Team	409,670
90830	ASD Advisory Service	280,700
90372	Therapeutic Thinking	108,190
90287	Early Development and Inclusion Team	155,185
90581	Dingley's Promise	155,000
90373	Emotionally Based School Avoidance (EBSA)(WBC Led)	190,740
90237	Emotionally Based School Avoidance (EBSA) (school led)	110,960
	Early Intervention Support Fund	232,090
90374	SEMH Practitioner	49,790
	SEMH Re-integration Practitioner	50,140
	High Needs Block: Non Top Up or Place Funding	5,675,333
	SSR	215,493
	High Needs Block Total	47,234,288

4.12 The increase in the estimated budget requirement for 26-27 relates mainly to the following costs:

- Independent and non-maintained school placements – increased budget requirement of **£2,513,130**
- Special School top ups - increased budget requirement of **£228,007**
- Increased cost of EOTAS provision of **£201,508**
- PRU - increased budget requirement of **£168,929** for excluded pupils and those with SEMH

5. Conclusion

5.1 The HNB continues to be under considerable pressure for the reasons set out in this report, due to increased demand for independent and non-maintained special school placements and increased EHCPs in mainstream schools. In the interim, the HFG / Schools Forum is asked to consider the deficit HNB budget as set out in this report.

6. View from the Heads' Funding Group

Report noted

7. Appendices

7.1 Appendix A - High Needs Budget Detail

7.2 Appendix B - Historical Data

Appendix A

High Needs Budget Detail

1. PLACE FUNDING – STATUTORY

- 1.1 Place funding is determined by the Department for Education (DFE) and has to be passed on to the institution, forming their base budget. Academy and FE places are included in the initial HNB allocation but the agreed place numbers are then deducted and paid to the institution direct (DSG top slice).
- 1.2 The DFE will not fund any overall increases to places. If additional places are needed in academies or FE colleges, a request can be made to the ESFA. However, any additional places agreed would be top sliced from West Berkshire's HNB allocation; no additional funding is made available.
- 1.3 As it is not possible to request increased planned place funding for maintained schools, any increase in place funding needed which is over and above the number of places set out below would need to be allocated to the relevant top up budgets, creating additional pressure on those budgets.

TABLE 1 - Place Funding Budget	2025/26 Budget			2026/27 Estimated Budget	
	No. of Places	£	Current No. of Pupils	Proposed No. of Places	£
Special Schools – pre 16	168	1,680,000	191	154	1,540,000
Special Schools – post 16	34	340,000		34	340,000
Resource Units Maintained – pre 16	47	304,000	33	47	282,000
Special Schools and PRU Teachers Pay and Pension		334,600			349,992
Resource Units Academies – pre 16 (DSG top slice)	97	598,000	104	97	582,000
Mainstream Maintained post 16	8	48,000	20	8	48,000
Mainstream Academies – post 16 (DSG top slice)	10	60,000	25	10	60,000
Further Education	131	786,000		131	786,000
i-college Place Funding	86	860,000	90	90	900,000
TOTAL	581	5,010,600		571	4,887,992

2. TOP UP FUNDING – STATUTORY

- 2.1 Top up funding is paid to the institutions where we are placing pupils who live in West Berkshire (we do not pay our institutions top up funding for pupils who live outside West Berkshire). **Table 2** shows the budget and forecast for 2025/26 and the estimate for 2026/27

TABLE 2		2025/26 Budget			2026/27	
Top Up Budgets	Budget £	Forecast £ (Month 6)	Over/ (under) £	Current pupils receiving top up (Nov25)	Estimate £	Difference 25/26 budget & 26/27 prediction
Special Schools Maintained	6,601,730	6,480,000	-121,730	287	6,829,737	+228,007
Non WBC special schools	257,870	294,350	36,480	14	288,140	+30,270
Non WBC free schools	504,750	761,840	257,090	31	600,725	+95,975
Resource Units Maintained	725,120	675,300	-49,820	35	725,120	0
Resource Units Academies	1,297,350	1,270,000	-27,350	96	1,310,324	+12,974
Resource Units Non WBC	43,720	60,950	17,230	4	48,180	+4,460
Mainstream Maintained	2,039,520	2,039,520	0	410	2,494,000	+454,480
Mainstream Academies	1,199,630	1,170,000	-29,630	251	1,373,620	+173,990
Mainstream Non WBC	124,980	150,650	25,670	28	130,700	+5,720
Non Maintained Special Schools	1,456,230	1,583,730	127,500	17	1,218,080	-238,150
Independent Special Schools	11,425,820	11,884,020	458,200	168	13,938,950	+2,513,130
Further Education	1,726,810	1,472,170	-254,640	148	1,743,880	+17,070
Disproportionate HN Pupils	200,000	200,000	0		272,000	+72,000
SEMH Provision Castle at Theale	1,901,700	1,901,700	0	38	2,180,371	+278,671
New Kennet Valley Resource	655,840	655,840	0	12	680,875	+25,035
TOTAL	30,161,070	30,600,070	439,000		33,834,700	+3,673,630

2.2 Maintained Special Schools

There will be an increase in costs of £228,007 this is due to the expansion of provision at The Castle School which is due to open in Jan 2026.

2.3 Non West Berkshire Special Schools

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

2.4 Non West Berkshire Free Schools

The free special schools used by West Berkshire Council are primarily schools for children with autism. These schools tend to be used for children whose needs cannot be met by our own resourced ASD provision in mainstream schools.

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

As part of the DBV programme a sufficiency plan is being created to increase the range of provision across West Berkshire, to ensure that current, and future, needs of children and young people with SEND are met locally, whilst allowing flexibility for adapting to changing demands. This will lead to increases in these budgets over time. For 26-27 there are small variations to the Academies/Maintained and Non West Berkshire resource units budgets this is due to moves for specific children.

2.6 Mainstream top ups (maintained and academies)

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

2.7 Independent special schools and non-maintained special schools

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

The predictions of cost for specialist placements in 2026-27 take in to account existing pupils, additional known pupils whose needs can no longer be met in local schools, together with some cases which are due to go to the SEND Tribunal. It is not possible to predict all pupils who may need placements in 2026-27. To account for this unpredictability, we have built in a percentage increase into the cost of these placements based on EHC plan trends over the last 3 years.

Due to the number of placements made over 25/26 and the continued demand for highly specialist placements the independent school budget is overspent and this is reflected in the budget forecast for next year.

2.8 Further Education

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

2.9 Castle@Theale Secondary SEMH Provision

The Castle @ Theale have agreed to create an additional places to reduce the need for independent school places. The provision is very cost effective compared to alternatives in the independent sector and unit costs are continuing to reduce as the provision fills up.

2.10 Kennet Valley SEMH Provision

Kennet Valley costs will see a small increase in costs due to staff inflation increases. The provision is very cost effective compared to alternatives in the independent sector. An additional cost for staff cover was incorporated for 25-26 & 26/27.

3 PUPIL REFERRAL UNITS (PRU) – STATUTORY

3.8 Table 3 shows the budgets for PRU top ups.

TABLE 3 PRU Budgets	2025/26 Budget			2026/27	
	Budget £	Forecast £ (Month 6)	Over/ (under) £	Estimate £	Difference 25/26 budget & 26/27 prediction
PRU Top Up Funding	1,196,370	1,196,370	0	1,340,190	+143,820
PRU EHCP SEMH Placements	1,255,470	1,265,890	10,420	1,280,579	+25,109
TOTAL	2,451,840	2,462,260	10,420	2,620,769	+168,929

3.9 The current year budget was based on the previous year's forecast. Schools Forum agreed to a 50% contribution from schools for pupils that they placed. Heads have requested that this contribution remains. Permanent exclusions are funded 100% by the High Needs Block less the average pupil led funding contribution recovered from schools.

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

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

4 OTHER STATUTORY SERVICES

Table 4 details the budgets for other statutory services.

TABLE 4	2025/26 Budget			2026/27	
	Other Statutory Services	Budget £	Forecast £ (Month 6)	Over/ (under) £	Estimate £
Education Other Than At School (EOTAS)	279,470	279,470	0	480,978	+201,508
Spot Purchase Alternative provision	376,090	376,090	0	453,161	+77,071
Sensory Impairment	251,220	288,830	37,610	302,522	+51,302
SEN Commissioned Provision	722,336	734,820	12,484	857,073	+134,737
Equipment for SEN Pupils	20,000	20,000	0	20,000	0
Therapy Services	614,680	614,680	0	671,285	+56,605
Elective home Education Monitoring	72,360	56,310	-16,050	100,310	+27,950
Medical Home Tuition	403,760	285,780	-117,980	513,810	+110,050
Hospital Tuition	36,180	36,180	0	36,180	0
SEND Strategy (DSG)	75,140	71,370	-3,770	75,430	+290
Fair Access Protocol	0	0	0	50,000	+50,000
Alternative Provision Co-ordinator	42,640	42,640	0	66,450	+23,810
TOTAL	2,893,876	2,806,170	-87,706	3,627,198	+733,322

4.1 EOTAS and Spot Purchases of Alternative Provision

This budget historically supported a small number of children with EHC Plans for whom the Authority had agreed an ABA programme. ABA is an intensive intervention programme for children with autism which aims to modify their behaviours, in order to allow children to function more successfully in school and in society. There are now fewer ABA programmes funded and this budget has been removed. We now have two new areas to support the costs of children with EHC Plans accessing other bespoke packages where this is the most appropriate and cost-effective way of meeting their needs, including SEN Personal Budgets. This budget has been split into EOTAS and Spot purchases of Alternative provision. These budget needs to increase due to increasing numbers of children with SEN Personal Budgets. There is a significant

overspend on this budget due to a number of high cost EOTAS packages have been awarded as part of tribunal appeals. It should be noted that SEN Personal Budgets can be a very cost-effective alternative to non-maintained and independent special schools, in particular for children who experience emotionally based school avoidance, for whom they are increasingly being requested by parents. The budget for these cost centres needs to increase by £278,579.

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

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

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

4.4 **Equipment for SEN Pupils**

This budget is used to fund large items of equipment such as specialist chairs and communication aids for pupils with EHC Plans. The budget has been reduced a number of times in previous HNB savings programmes and was removed entirely in 2018-19 on the basis that schools would meet these costs. However, this created a pressure for nurseries as they do not have delegated SEN budgets, and for resourced schools which have a disproportionate number of children with specialist equipment needs. It was agreed in 2018-19 that a budget of £10,000 would be made available to meet these needs. In 2019-20 it was agreed that the budget should be increased again to £15,000 as demand for equipment for children in nurseries and resourced schools was increasing. It is recommended that the budget increases to £20,000 and all mainstream schools are able to request funding for equipment over the cost of £500 as this has a very significant impact on school budgets especially for smaller primary schools.

4.5 **Therapy Services (Contract with Berkshire Healthcare Foundation Trust)**

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

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

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

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

4.6 Elective Home Education (EHE) Monitoring

Local Authorities have a statutory duty to monitor Elective Home Education (EHE) arrangements made by parents and to ensure that all children are receiving a suitable education. Oversight of EHE monitoring falls under the Education Welfare and Safeguarding Service.

4.7 Medical Tuition Service

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

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

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

capabilities to support the broad spectrum of needs within the service. There will be a requirement for this area to be further developed and supported.

4.8 Hospital Tuition

The Local Authority is obliged to pay the educational element of specialist hospital placements, usually for severe mental health issues. These placements are decided by NHS colleagues and we have no influence over the placement or duration of stay. As numbers and costs are impossible to predict, it is proposed that the 2026-27 budget remains the same as 2025-26.

4.9 SEND Strategy Officer

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

4.10 Alternative Provision / EOTAS Coordinator

It is proposed that an additional post of Alternative Provision / EOTAS Coordinator is funded in 26-27) in order to reduce pressure for specialist placements for children who have ceased attending school due to EBSA. Currently EBSA is a key driver of spend on independent specialist placements. This post would provide capacity to set up and oversee alternative packages of education where this is an appropriate alternative to a specialist placement. In many cases a package of support would meet with parental preference, potentially meet the child's needs better than a school placement and could be considerably more cost effective. The only current barrier to such arrangements is lack of capacity to organise packages and ensure they are suitably monitored. The post was only budgeted for 7 months in 25/26, the additional cost is for the post to be for a full year.

5 NON-STATUTORY Services

5.1 **Table 5** details the non-statutory service budgets for 2025-26, predicted outturn, and estimates for 2026-27.

5.2 The table shows the budget for these services in 2026-27 assuming that the services continue and there are no changes to staffing levels. Should decisions be made to reduce or cease any non-statutory services, the 2026-27 HNB budget will be adjusted accordingly.

TABLE 5	2025/26 Budget			2026/27	
Non Statutory Services	Budget £	Forecast £ (Month 6)	Over/(under) £	Estimate £	Difference 25/26 budget & 26/27 prediction
Language and Literacy Centres LALs	183,920	183,920	0	194,470	+10,550
Specialist Inclusion Support Service	50,000	50,000	0	50,000	0
PRU Outreach Service	61,200	61,200	0	61,200	0
Cognitive and Learning Team	395,110	349,650	-45,460	409,670	+14,560
ASD Advisory Service	273,440	321,390	47,950	280,700	+7,260
ASD Fund - Additional support	52,690		-52,690	0	-52,690
Therapeutic Thinking	76,700	65,950	-10,750	108,190	+31,490
Vulnerable Children	50,000	50,000	0	0	-50,000
Vulnerable Children	129,400	129,400	0	0	-129,400
Early Development and Inclusion Team	151,355	128,611	-22,744	155,185	+3,830
Dingley's Promise	125,000	125,000	0	155,000	+30,000
Emotionally Based School Avoidance (EBSA)	144,520	144,520	0	190,740	+46,220
EBSA (Academies)	110,960	110,960	0	110,960	0
Early Intervention Support Fund	0	0	0	232,090	+232,090
Transition project - part funded DBV	46,310	46,310	0	0	-46,310
SEMH Practitioner	52,240	33,800	-20,440	49,790	-4,450
SEMH Re-integration Practitioner	0	0	0	50,140	50,140
Extension of i-college – included in place funding	90,000	90,000	0	0	-90,000
TOTAL	1,994,845	1,890,711	-104,134	2,048,135	+53,290

5.3 Language and Literacy Centres (LALs)

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

5.4 Specialist Inclusion Support Service

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

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

5.5 PRU Outreach

The PRU Outreach Service offers consultancy / outreach support mainly to students who have been attending the iCollege and are starting to attend a mainstream school.

Schools may request outreach for any pupil causing concern but it is dependent on capacity.

5.6 Cognition and Learning Team

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

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

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

5.7 Autism Team

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

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

5.8 Vulnerable Children

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

This has always been a well-used resource that helps schools support vulnerable pupils with complex needs.

To increase access to and oversight of funding to all West Berkshire schools, a process of alignment has taken place 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 are:

- Vulnerable Children's Grant
- Therapeutic Thinking Support fund
- Autism Limited Fund
- Virtual School fund (not high needs block)
- Emotionally Based School Avoidance (EBSA) Support Fund

This Early Intervention Support Funding (EISF) 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.

5.9 Early Development and Inclusion Team

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

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

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

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

Continuation of the 0.90 FTE has been agreed by Neil Goddard as an invest to save for 25/26 & 26/27 to continue the provision listed above.

5.10 Dingley's Promise

Dingley's Promise is a charitable organisation which provides registered early years education for children under five with SEND in West Berkshire, Reading and Wokingham. It is the only specialist early years SEND setting in the private, voluntary and independent early years sector in West Berkshire. It provides an alternative to mainstream early years settings, where experience and expertise in SEND can vary greatly. Parents are able to take up their early years' entitlement at Dingley's Promise, rather than at a mainstream early years setting, if they wish. However, Dingley's Promise are only able to claim the standard hourly rate for providing the early years entitlement as mainstream settings, in spite of offering specialist provision, higher ratios and more one to one support.

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

Dingley's Promise has made a request for additional resources due to ongoing viability issues as a result of reduced charitable income and some large grants ending. Their annual running costs are £240,000 and they receive £100,000 in income from the Council including early years place funding, funding for one-to-one support for individual children and the £30,000 annual grant from the HNB. The balance of £140,000 has to come from

fund raising. The organisation has reported reduced ability to achieve income through fund raising as well as an anticipated reduction in income in 2024-25 due to a large Children in Need grant ending. The West Berkshire centre is running at a loss and effectively being subsidised by centres in other areas.

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

5.11 Emotionally Based School Avoidance (EBSA)

This support is divided into two separate pathways, a Local Authority led pathway for primary schools and school led provision for secondary schools. The aim of the EBSA Advisory Support team is to help schools to support children and young people who struggle to attend school due to emotional, mental health or anxiety-related reasons – some of which are connected to how they experience the school environment. The team aims to increase pupil attendance and/or their engagement in education, and to support them to thrive in school and reduce the need for alternative provision.

There is a requirement to add an additional SEMH Practitioner to join the team due to the increased number and complexity of cases being referred to the team for support and to support strategic activity including training to schools and the creation of an EBSA Early Identification toolkit. It is also necessary to increase time available to the current EBSA Coordinator to full-time, rather than the current term time only.

5.12 Reintegration Practitioner

Following on from 5.6 above, the creation of a new role (SEMH Reintegration Practitioner) to enable supported reintegration, to:

- Work with the school and family to create supportive re-integration timetables.
- Provide both schools and parents with robust signposting support regarding referrals, interventions and other available services available.
- Monitor outcomes for previously PEX pupils placed back into mainstream.
- Provide 1 to 1 SEMH interventions to support pupils.

The projected cost of an SEMH Practitioner for 2026/27 is £50,140.

It should be noted however that the cost of a 2nd PEX is a minimum of £30,000 per year depending on banding. For example, the issuing of a 2nd PEX to a year 8 pupil will cost the LA more than £90,000.

Appendix B

Historical Data Outturn

TABLE A	2022/23	2023/24	2024/25
Top Up Funding	£	£	£
Special Schools Maintained (90539)	5,233,228	5,676,186	5,786,363
Non WBC special schools (90548)	524,418	445,499	424,241
Non WBC free schools (90554)	535,617	660,692	587,386
Resource Units Maintained (90617)	317,407	655,772	728,843
Resource Units Academies (90026)	993,556	1,378,364	1,237,390
Resource Units Non WBC (90618)	131,516	95,738	89,424
Mainstream Maintained (90621)	1,182,597	1,687,494	1,981,641
Mainstream Academies (90622)	640,595	928,159	1,181,604
Mainstream Non WBC (90624)	169,046	152,115	159,013
Non Maintained Special Schools (90575)	875,863	1,092,852	1,365,343
Independent Special Schools (90579)	3,683,566	4,965,814	8,174,961
Further Education (90580)	1,149,072	1,628,914	1,416,357
Disproportionate HN Pupils (90627)	86,321	194,565	230,302
SEMH provision at Theale (90556)	765,987	986,986	1,462,584
SEMH provision at Kennet Valley (90557)	0	1,319	433,500
TOTAL	16,288,789	20,550,468	25,258,952

TABLE B	2022/23	2023/24	2024/25
PRU Funding	£	£	£
PRU Top Up Funding (90625)	902,512	959,950	1,055,749
PRU EHCP SEMH Placements (90628)	927,182	1,084,765	1,326,973
TOTAL	1,829,694	2,044,715	2,382,722

TABLE C	2022/23	2023/24	2024/25
Other Statutory Services	£	£	£
Applied Behaviour Analysis (90240)	246,773	335,102	254,795
Education Other Than At School (EOTAS)			238,824
Spot Purchases - Alternative Provision			121,594
Sensory Impairment (90290)	250,722	264,955	275,034
SEN Commissioned Provision (90577)	622,999	654,469	661,048
Equipment for SEN Pupils (90565)	16,231	-872	-1,852
Therapy Services (90295)	329,133	490,251	535,397

Elective home Education Monitoring (90288)	26,123	33,084	40,714
Medical Home Tuition (90282)	202,609	208,124	203,869
Hospital Tuition (90610)	34,000	5,055	2,096
SEND Strategy (DSG) (90281)	56,157	66,653	64,178
TOTAL	1,784,747	2,056,821	2,395,697

Table D Non Statutory Services	2022/23 £	2023/24 £	2024/25 £
Language and Literacy Centres LALs (90555)	187,553	161,690	171,840
Specialist Inclusion Support Service (90585)	50,000	50,000	50,000
PRU Outreach Service (90582)	61,200	61,200	61,200
Cognitive and Learning Team (90280)	328,257	345,230	310,324
ASD Advisory Service (90830)	268,046	282,703	272,098
Vulnerable Children (90961)	178,980	112,558	74,589
Early Development and Inclusion Team (90287)	86,663	91,294	56,511
Dingley's Promise (90581)	30,000	30,000	105,000
Therapeutic Thinking (90372)	52,457	30,986	54,508
Emotional Based School Avoiders (WBC managed)	123,879	105,075	101,001
Emotional Based School Avoiders (School managed)	99,864	111,199	110,960
Early Years Speech & Language (Invest to Save)	7,665	12,290	0
SEMH Practitioner (invest to save)	14,497	25,482	17,526
TOTAL	1,489,061	1,419,707	1,385,558

High Needs Block (HNB) Budget 2026/27

TABLE E	2022/23			2023/24			2024/25		
Place Funding	pupil numbers	planned places	£	pupil numbers	planned places	£	pupil numbers	planned places	£
Special Schools – pre 16	448	286	2,860,000	409	286	2,860,000	423	286	2,860,000
Special Schools – post 16		79	790,000		79	790,000		79	790,000
Resource Units Maintained – pre 16	32	35	222,000	33	35	238,000	33		234,000
Special Schools and PRU Teachers Pay & Pension			304,690			324,864			332,520
Mainstream Maintained post 16	6	6	36,000	16	6	36,000	6	6	36,000
PRU Place Funding	72	66	660,000	72	66	660,000	72	66	660,000
TOTAL			4,872,690			4,908,864			4,912,520

Agenda Item 14

Education Services

Service Director : Neil Goddard

Home to School Transport
Disabled Children Budgets
Mental Health & Behaviour Support Services
School Improvement & SEN services
Early Years Provision
Management & Strategy
Trading services

Total

2025/26 Budget	Previous quarter forecast outturn	Q1 Forecast Outturn	Variance
			£
5,440,470	N/A	5,317,160	(123,310)
68,430	N/A	69,310	880
921,890	N/A	889,210	(32,680)
1,759,740	N/A	1,812,730	52,990
511,860	N/A	508,520	(3,340)
359,480	N/A	552,930	193,450
(206,310)	N/A	(6,590)	199,720
8,855,560	0	9,143,270	287,710

variances are shown as (underspend) / overspend

2024/25 Budget	2024/25 Outturn	Variance
		£
4,122,900	5,027,822	904,922
4,712,650	6,038,189	1,325,539
781,250	614,568	(166,682)
1,597,160	1,609,903	12,743
440,330	386,399	(53,931)
207,820	519,296	311,476
(208,830)	(174,905)	33,925
11,653,280	14,021,272	2,367,992

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

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.

Additional data to support forecast

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Agenda Item 15

Schools Forum Work Programme 2025/26

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 3	Work Programme 2026/27	24/02/2026	03/03/2026	09/03/2026	16/03/2026	Decision	Jessica Bailiss
	Provisional DSG Funding Settlement Overview 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Discussion/Comment	Lisa Potts
	Budgets for Additional Funds 2026/27	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Decision	Lisa Potts
	Early Years Funding Rates to Providers and 2026/27 Early Years Budget	17/12/2025	07/01/2026	13/01/2026	19/01/2026	Decision	Lisa Potts/Beth Kelly
	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/Emma Ferrey
	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

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Schools' Forum - Contracts - Forward Plan

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

Contract Title	Contract Start Date	Contract End Date (initial term)	Contract End Date (Including any Extension)	Contract Term in years (in brackets maximum possible extension)	Contract Total Value (£) based on Initial Term	Contract Amount (Total Value inclusive of Contract Extension Agreed)	Supplier name	WBC Responsible Officer	Notes
Special Educational Needs and Disabilities (SEND) Information, Advice and Support Service (SENDIASS)	01/08/2021	31/07/2024	31/07/2025	3 (4)	£164,850	£239,500	Rose Road Association	Gerard Strong / Tony Parker (supports procurement process only)	This contract is not funded from the DSG and is an Information item only. <u>December 2025 Update:</u> The recommissioning work for SENDIASS is ongoing. All preparatory reports and documentation have been completed, and the service is ready to move to the next procurement stage. A wider review of future delivery options is currently under way, and this needs to be concluded before procurement can proceed. This review has extended the original timetable, and the revised schedule will be confirmed once the preferred delivery approach has been agreed
Education Packages for Young People with Severe Social Emotional and Mental Health Difficulties	01/09/2025	31/08/2028	31/08/2028	3	£2,514,777		Engaging Potential LTD	Hannah Geddert / Rebecca Page (supports procurement process only)	<u>October Update (no further update for December):</u> Contract awarded to Engaging Potential following a PIN and VEAT. Three-year contract with no extension which reflects a strategic shift in our commissioning approach and resourcing capacity. Contract awaiting signature.
Energy Framework - CCS framework RM6011 - Electricity	01/04/2017 (rolling contract since 2008)	01/10/2023	31/03/2027		£5,421,522		EDF (HH)	Sarah Wood	The central energy contract is a non-mandated contract that maintained schools can access for provision of their gas and electricity.
Energy Framework – CCS Framework RM6011 - Gas	01/04/2017 (rolling contract since 2008))	01/10/2023	31/03/2027		£1,325,589		Total	Sarah Wood	
Children and Young People's Integrated Therapies (CYPIT)	01/04/2023	31/08/2028	31/03/3031	5 (3)	£2,348,480	£3,757,568	Berkshire Healthcare Foundation Trust	Tony Parker / Thomas Bailey (supports procurement process only)	A report was brought to the Schools' Forum meeting in October 2022 and the new therapy contract was agreed.

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