

# DRAFT

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

## SCHOOLS FORUM

### MINUTES OF THE MEETING HELD ON MONDAY 19 JANUARY 2026

**Present:** Kavash Bamfield (Maintained Primary Schools), Reverend Mark Bennet (Church of England Diocese), Catherine Bernie (Academy Special Schools), Councillor Heather Codling (Deputy Leader & Executive Portfolio Holder: Children and Family Services), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), Mel Godliman (Early Years PVI Settings), Richard Hand (Trade Union), Chris Prosser (Maintained Secondary Schools), Michelle Harrison (Maintained Primary Schools), Rebecca Hartley (Maintained Primary Schools), Jo Lagares (Maintained Primary Schools), Phil Spray (Maintained Primary Schools), Chloe Summerville (Maintained Nursery Schools) and Edwin Towill (Academy Schools)

**Also Present:** Emma Ferrey (Interim Service Manager of SEN), Edith Cheng (Finance Manager), Hine Thompson (Senior Finance Business Partner), Joshua Ngeresa (Finance Manager) Kirstie Hanson (Head of Early Years), Crystal Elkabbas (Principal Educational Psychologist & SEMH Service Manager) and Jessica Bailiss (Democratic Services Officer)

**Apologies for inability to attend the meeting:** Jay Armstrong (Maintained Primary Schools), Jacquie Davies (PRU), David Fitter (Academy Schools), Keith Harvey (Maintained Primary Schools), Jon Hewitt (Maintained Special Schools), Julie Lewry (Maintained Academy Schools), Jo MacArthur (Maintained Primary Schools), Lisa Potts (Finance Manager), David Ramsden (Maintained Secondary Schools), Charlotte Wilson (Academy Schools) and Neil Goddard (Service Director - Education and SEND)

#### PART I

##### 1 Minutes of previous meeting dated 1st December 2025

The Minutes of the meeting held on 1<sup>st</sup> December were approved as a true and correct record and signed by the Chair.

##### 2 Actions arising from previous meetings

Emma Ferrey reported on the two actions arising from the December meeting. Regarding Dec25-Ac1 she confirmed that work continued to improve the quality of Education Health and Care Plan (EHCP) data, with monthly data-cleansing sessions leading to a significant reduction in errors. The second part of this action involved a review of the funding model, with a report on banding and funding expected for the next meeting, aiming for implementation from September 2026.

Emma Ferrey referred to Dec25-Ac2 and advised that work on developing a traded offer within the Educational Psychology Service, led by Crystal Elkabbas was underway. Initial discussions had already taken place at the Senior Management Team meeting and the project was moving forward.

##### 3 Minutes from the Heads' Funding Group for Information

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

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### 4 **Declarations of Interest**

There were no declarations of interest received.

### 5 **Membership**

Jess Bailiss reported that Reverend Mark Bennet and Richard Hand had reached the end of their term of office and following consultation had confirmed they would continue for a further term.

### 6 **Work Programme 2026/27**

Jess Bailiss reported that the item sought agreement of the Work Programme for 2026/27 included on page 15 of the agenda pack. Reporting largely followed the same pattern as in previous years and was subject to change. It was noted that the items due at the Schools' Forum in July would go to the Heads' Funding Group in May and this needed to be more accurately reflected on the work programme.

The Chair invited the Forum to consider the work programme for 2026/27. It was proposed and seconded that it be agreed and at the vote the motion was approved.

**RESOLVED that** the Schools' Forum agreed the work programme for 2026/27.

### 7 **Central School Block Budget Proposals 2026/27**

Hine Thompson introduced the report (Agenda Item 8), which set out the budget proposals for the Central School Services Block (CSSB) for 2026-27. No questions or observations were raised by members of the Forum.

The Chair invited the Forum to consider the recommendation to set the CSSB budget with a deficit as set out in the report. The recommendation was proposed and seconded and at the vote with all Forum members the motion was approved.

**RESOLVED that** the Schools' Forum approved the recommendation set out in section 2.1 of the report.

### 8 **Budgets for Additional Funds 2026/27**

Hine Thompson introduced the report (Agenda Item 9), which set out the proposed 2026/27 budgets for additional funds. It was noted that due to there being a deficit on the total Dedicated Schools Grant, the Department for Education had advised that the growth fund should be retained centrally. Hine Thompson reported that the Growth Fund balance at 31 March 2025 was £685k with an estimated balance of £1.9 million by March 2027 after contingencies and anticipated drawdowns. The Forum noted the information on growth funding and that agreement was sought to set the additional High Needs Fund at £272k. Hine Thompson explained that the additional High Needs budget had risen by £72k compared to the previous year (£200k). The additional funding was required to support a disproportionate rise in high-needs pupils, which was the main driver for the proposed increase. No questions were raised by members of the Forum.

The Chair invited the Forum to consider the recommendation to set the additional High Needs Fund at £272k. The recommendation was proposed and seconded and at the vote with all Forum members the motion was approved.

**RESOLVED that** the recommendation set out in section 2.2 of the report was noted.

## 9 Early Years Funding Rates to Providers and 2026/27 Early Years Budget

Hine Thompson presented the report (Agenda Item 10), which set out proposals for the 2026-27 Early Years budget and rates, based on recommendations from the Early Years Funding Group.

Hine Thompson reported that the proposed Local Authority rate was £1.15 for early years pupils, and the provider rate was £1.92, which was an 11.6% increase. She outlined the wider context, noting pressures arising from the government's planned expansion of the 30-hour childcare offer to children aged nine months to three years by 2027/28, combined with sector uncertainty relating to new entitlements and falling birth rates. Once the Early Years deficit was fully addressed, the intention was to retain a small contingency to manage volatility.

Hine Thompson noted that the historic Early Years deficit had reduced substantially and the reasons for this were set out in the report. A forecast deficit of £180k was expected at the end of 2025/26, shifting to a forecast surplus of £124k in 2026/27.

No questions were raised by the Forum, the Chair therefore invited members to consider the recommendation to agree the hourly rates for Early Years entitlement for 2026/27 and that the Early Years DSG budget for 2026/27 be set at the level detailed in the budget model. A proposal to agree the recommendations was proposed and seconded and at the vote with all forum members the motion was approved.

**RESOLVED** that the recommendations set out in section two of the report were agreed.

## 10 Final DSG Funding Settlement Overview 2026/27

Hine Thompson introduced the report (Agenda Item 11), which set out the final Dedicated Schools Grant (DSG) allocation for 2026/27. The table under section 4.3 of the report showed the 2026/27 DSG final allocation by block and was based on the October 2025 census pupil numbers. The table included both the monetary and percentage changes. More detail was provided on each of the blocks from section five of the report onwards.

Kavash Bamfield asked about the scale of the structural gap between the Council's statutory Special Education Needs and Disability (SEND) duties and the funding available. She noted that headteachers were concerned about delays in the Education Health and Care Plan (EHCP) process and queried whether the funding received was adequate to meet statutory timeframes.

Emma Ferrey sought clarification on whether the concern related to the need to ensure the Local Authority (LA) was delivering on the 20 week timeline and putting more of the LAs central service investment into that area or whether additional resources were felt to be required. Kavash Bamfield acknowledged that no additional funding was available but explained that headteachers were concerned about the LA's ability to meet statutory EHCP duties within required timescales. She said it appeared that the level of funding provided did not adequately support the work required.

Emma Ferrey noted that West Berkshire's SEND team was broadly comparable to that of neighbouring authorities. She noted that one of the differences they could look at was how the system worked compared to these areas and she had set up some time with the SEND Manager to review team structures and workflow.

Emma Ferrey commented that EHCPs produced locally were written to a very high standard, which could be contributing to delays, and that efficiencies might be possible while maintaining clear statements of needs and provision. Emma Ferrey highlighted delays caused by the need to wait for Educational Psychology (EP) assessments.

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Additional resource had been provided to the EP service to address backlogs, alongside work to clarify statutory and traded elements of the service. Emma Ferrey emphasised the need to balance statutory timelines with support to schools through services such as the autism support and inclusion teams and, as the new head of service for the area, this formed part of what she would be focusing on. She welcomed ideas from teachers about where improvements could be made and was open to suggestions.

Revered Mark Bennet asked how much additional funding would be required to meet statutory obligations in a timely way, noting that an indicative figure would be helpful when making representations to Members of Parliament.

Emma responded that this was difficult to calculate until national SEND reforms were confirmed. She explained that possible changes, such as thresholds for EHCP eligibility, remained uncertain. She advised that national policy direction was focused on building capacity in mainstream schools through training, support and the development of additional resource provisions.

Councillor Iain Cottingham provided further context on wider local government funding. He explained that the government's fair funding review classified West Berkshire as an area of low deprivation, resulting in a proposed reduction in the share of business rates retained locally. He reported that the LA currently retained around £30 million but that proposals would reduce this to £13 million, mitigated only temporarily through a Revenue Support Grant which was due to be withdrawn by 2027/28. Councillor Cottingham noted that this made additional LA funding unlikely in the foreseeable future. He commented that it was unclear whether deprivation metrics might also be used in future High Needs Block funding. Emma confirmed that the metric for future High Needs allocations had not yet been announced.

Rebecca Hartley asked whether work was being undertaken to quantify the funding gap more accurately, and whether consideration was being given to how much of individual schools' deficits were a direct result of a lack of funding for high needs and EHCPs. She suggested that these deficits might be obscuring the true extent of the local funding shortfall.

Emma Ferrey agreed that this was an important issue and confirmed that finance colleagues would have greater awareness of how school deficit positions were reported to the LA. She explained that the position was complex and involved both statutory pressures and the need for early intervention and prevention. She also highlighted concerns about the rising costs of placements in independent and non-maintained special schools, noting that some placement costs had doubled over the past year despite efforts to reduce demand for such placements.

Kavash Bamfield asked a further question. She noted the increasing demand for SEND support and pressures on statutory timeframes and asked whether portfolio holders were prepared to invest in additional SEND officers to increase capacity and improve timeliness. She expressed concern that the current staffing level of two SEND Officers was not sufficient to meet statutory duties.

Councillor Cottingham explained that the LA faced a significant budget shortfall for 2026/27 and had required Exceptional Financial Support in the previous two financial years, with further support likely to be necessary. He advised that any request for additional staffing would require a business case which would be considered through the budget-setting process. He noted that commissioning reviews were underway across Adults and Children's Services which might release funding for reinvestment.

Kavash Bamfield indicated that she would welcome a transparent discussion involving senior officers and portfolio holders going forward, because she was concerned statutory duties were not being met with the resources provided. Councillor Cottingham confirmed

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that this would be a matter for the Executive Director and Service Director for Education. Kavash Bamfield felt that it was important that Councillors were part of these discussions as they would be key in making requests to Council for increased funding to meet statutory duties. Kavash Bamfield stated that she would follow this up with AnnMarie Dodds and Neil Goddard. Emma Ferrey proposed that officers bring back data on statutory timelines to the next Heads' Funding Group in June and subsequent Schools' Forum meeting. The Chair thanked members for the discussion and noted that the issues raised would be taken forward by Officers.

**RESOLVED that** a report would be brought to the next round of meetings in June, which provided data on statutory timelines.

### 11 Final School Funding 2026/27

Hine Thompson introduced the report (Agenda Item 12), which set out the final school funding formula allocations for 2026/27. Political ratification was required for the LA to be able to issue budgets to maintained schools and allocations had to be distributed to schools by 27th February 2026.

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

### 12 Growth Fund Applications 2025/26

Hine Thompson introduced the report (Agenda Item 13), which aimed to inform Schools' Forum members of payments recommended to be made to schools from the Growth Fund budget in 2025/26. With reference to the October 2025 Census data, no schools had met the criteria for growth in relation to basic need requirements and therefore it was noted that no payments would be made.

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

### 13 High Needs Block Budget Proposals 2026/27

Emma Ferrey introduced the report (Agenda Item 14), 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. Emma Ferrey explained that it provided an overview of the ongoing strategy to reduce pressure on the High Needs Block. She noted that whilst an overspend was still projected for 2026/27, the rate of increase had reduced significantly compared with previous years when in-year overspends had nearly doubled annually. Emma Ferrey attributed this improvement to the Delivering Better Value (DBV) programme and to strengthened central services. She outlined the range of work underway, including the creation of sufficient specialist places, increased early intervention and prevention, and greater support for mainstream settings. She confirmed, however, that the budget remained some distance from being brought into balance.

Rebecca Hartley commented that the proposals did not specifically reference pressures on small schools, which she felt were disproportionately affected by the costs of meeting additional needs due to limited space, resources and specialist expertise. She highlighted that parents often chose small schools for children with SEND without realising that provision could be more costly to deliver. Emma Ferrey acknowledged this issue and confirmed that, as part of the new banding model, this would be reviewed annually to ensure disparities were identified and addressed.

Rebecca Hartley further questioned the extent to which education services were covering needs that should sit within health. She expressed concern that schools were increasingly taking on responsibilities that had historically been funded by health services. Emma Ferrey agreed that this was an area requiring attention and confirmed

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she had raised it with the Executive Director. It was noted that some needs currently treated as educational might more appropriately fall under social care or health, and that the restructuring of Integrated Care Boards created uncertainty. Emma Ferrey added that health, including public health, should be held to account for its responsibilities, and she hoped upcoming national policy statements would reinforce shared accountability across agencies.

Councillor Iain Cottingham referred to data in Table 4.1 of the report and observed that West Berkshire's percentage increase in demand since 2019 appeared higher than the national trend. He asked what might be driving this increase, given the associated budget pressures. Emma Ferrey said there was no single explanation but outlined several contributing factors. These included insufficient funding for SEND Support within schools and a significant increase for EHCPs from parents, due to the additional resources associated. It was noted that there were incentives, but these were counterproductive in some cases.

Revered Mark Bennet raised concerns about the impact on small schools of any standard baseline expectations for SEND provision. He felt such developments could place significant strain on small settings, many of which were church schools, and asked for ongoing dialogue with the Diocese on this. Emma Ferrey confirmed that both she and the Service Director for Education would welcome continued engagement with the Oxford Diocese to understand pressures and support schools appropriately.

Chris Prosser asked whether Castle at Theale was at full capacity. Emma Ferrey believed the school was operating at capacity, though she noted there might be one remaining allocation panel. She added that the number of special school places was increasing and that demand for specialist places remained high.

Councillor Cottingham sought clarification on whether the sufficiency strategy referenced in the report related to place planning across the authority. Emma Ferrey explained that the strategy had formed part of the DBV programme and had originally covered 2024/25. She noted that updated SEN projection data was now available and that she and colleagues were working with schools to consider potential additional provision. Work was planned to update the sufficiency strategy for 2026/27.

The Chair thanked members for their questions and Emma Ferrey for her detailed responses.

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

### 14 DSG Monitoring 2025/26 - Quarter 3

Hine Thompson introduced the report (Agenda Item 15), which set out the forecast financial position of the services funded by the Dedicated Schools Grant (DSG), highlighting any under or overspends, and to highlight the cumulative deficit on the DSG.

It was noted that the DSG expenditure budget was £156.3 million which was £14 million more than the available funding. The Quarter three forecast showed a in-year deficit of £13.8 million, and the cumulative year-end deficit at £29.9 million. It was noted that with new funding streams in 2025/26 within the Early Years Block it was difficult to forecast accurately.

Hine Thompson concluded that total forecast deficit on the DSG amounted to £30.4m, with the position to be continuously monitored. No questions or comments were raised by members.

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

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**15 Contracts Forward Plan**

The Schools' Forum noted the contracts forward plan.

**16 Date of the next meeting**

The Chair announced the next formal meeting would be on Monday 15th June, via Zoom.

The Chair highlighted an upcoming training session due to take place on 16th March, which would be held in person at the Roger Croft Room at Market Street. The current start time of the session was 5pm however, Forum members could let Jess Bailiss know if they would prefer a slightly earlier start time. Forum members were encouraged to attend for its importance and the opportunity to meet in person. Members were also asked to let Jess Bailiss know if there were any specific areas they would like covered.

*(The meeting commenced at 5pm and closed at 6.10pm)*

**CHAIR** .....

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