

Notice of Meeting

Schools Forum

Monday 19 January 2026 at 5.00pm
Virtual Zoom Meeting

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

Date of despatch of Agenda: Tuesday 13 January 2026

For further information about this Agenda, or to inspect any background documents referred to in Part I reports, please contact Jessica Bailiss on (01635) 503124
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Agenda - Schools Forum to be held on Monday 19 January 2026 (continued)

Forum Members: 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 (Chairman), Phil Spray, Chloe Summerville, Edwin Towill and Charlotte Wilson

Agenda

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Sarah Clarke
Executive Director - Resources

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SCHOOLS FORUM

**MINUTES OF THE MEETING HELD ON
MONDAY 1 DECEMBER 2025**

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

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

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

PART I

1 Minutes of previous meeting dated 13th October 2025

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

2 Actions arising from previous meetings

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

3 Minutes from the Heads' Funding Group for Information

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

4 Declarations of Interest

There were no declarations of interest received.

5 Membership

There were no membership updates.

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

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

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

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

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

RESOLVED that the revised HFG ToR were approved.

7 School Funding Formula 2026/27 (Lisa Potts)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

RESOLVED that:

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

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

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Lisa Potts introduced the report (Agenda Item 9), which set out the details, cost and charges to schools of the services on which maintained schools' representatives were required to vote on an annual basis. It was highlighted that ethnic minority and traveller achievement services (EMTAS) would be delivered differently for 2026/27 and that the school improvement function would now be funded from the LA's revenue budget rather than through de-delegation.

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

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

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

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

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

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

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

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

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

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

It was reported that the HFG had considered four options and recommended continuing the delegated funding for a further year before reviewing progress and considering a traded model. Vanessa Grizzle reported that some concerns had been raised in the past

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about the service offer and these would be addressed moving forward through providing additional elements including staff well-being sessions, bookable consultations, focus groups with schools, and alignment with other services to improve early identification and transitions. Vanessa Grizzle also confirmed that monitoring would include case studies, focus groups and impact and analysis data linked to KPIs, with annual updates to the Forum. The full details on this were included in the report.

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

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

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

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

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

RESOLVED that

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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the budget proposals. He confirmed that the new banding arrangements were intended to take effect from the next financial year, subject to agreement.

Neil Goddard emphasised that while actions taken to date were reducing the rate of increase, the scale of the deficit remained a national issue requiring a national solution. He also reminded members that government proposals to assume responsibility for historic deficits were expected from 2028, but until then, the LA faced ongoing financial pressure, including interest costs on the cumulative deficit.

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

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

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

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

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

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

14 Forward Plans

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

15 Date and Format of the next meeting

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

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

CHAIR

Date of Signature

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Agenda Item 3

Actions from previous meetings

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Update
Dec25-Ac1	1st December 2025	School Funding Formula 2026/27 (Criteria for Additional Funds)	The approach to how data was collected regarding EHCPs would be reviewed and reported on at the next meeting.	Neil Goddard	This is being progressed. The issue was as a result of concerns around data quality. A review of the use of Capita (MRI) is being implemented that should address this. Emma Ferrey is taking forward a review of how the funding model can be updated to reflect this.
Dec25-Ac2	1st December 2025	PIPS	The Schools' Forum would review progress and a traded model would be reconsidered in the future.	Neil Goddard / Crystal Elkabbas	this will be picked up as part of the development of the offer for 2026/27 and the Forum will be consulted through the usual processes.

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

HEADS FUNDING GROUP

MINUTES OF THE MEETING HELD ON WEDNESDAY 7 JANUARY 2026

HFG Members Present: Kavash Bamfield, Nicolle Browning, David Fitter, Jo MacArthur, Chloe Summerville and Edwin Towill

Also Present: Edith Cheng (Finance Manager), Crystal Elkabbas (Principal Educational Psychologist & SEMH Service Manager), Emma Ferrey (Interim Service Manager of SEN), Neil Goddard (Service Director - Education and SEND), Kirstie Hanson (Head of Early Years), Lisa Potts (Finance Manager), Hine Thompson (Senior Finance Business Partner), Jessica Bailiss (Democratic Services Officer)

Apologies for inability to attend the meeting: Catherine Bernie, Jacquie Davies, Michelle Harrison, Keith Harvey, Jon Hewitt, Jo Lagares, Chris Prosser, David Ramsden and Charlotte Wilson

PART I

1 Minutes of the Previous Meeting

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

2 Actions Arising from Previous Meetings

The minutes from the last meeting were noted.

3 Central School Block Budget Proposals 2026/27 (Lisa Potts)

Lisa Potts introduced the report, which set out the budget proposal for services funded from the Central Schools' Services (CSSB) block of the DSG.

The HFG noted that the confirmed grant for the Central Schools Services Block resulted in a shortfall of £65,647. It was reported that the grant had continued to reduce by 2.5% annually and was based on pupil numbers, which had declined.

The HFG noted that a deficit would need to be set for 2026/27 to reflect actual costs and demonstrate funding pressures to the Government. It was acknowledged that savings might be identified during the year but agreed that the proposed budget and approach should proceed to Schools' Forum for decision.

RESOLVED that the HFG agreed that the proposed CSSB budget should go forward to the Schools' Forum on 19th January for consideration and decision.

4 Early Years Funding Rates to Providers and 2026/27 Early Years Budget (Lisa Potts)

Lisa Potts introduced the report, which set out the proposal for the Early Years budget 2026/27, which is based upon the recommendations of the Early Years Funding Group.

The Heads' Funding Group (HFG) noted that the forecast for 2025/26 indicated an overspend of £180k, which represented a significant improvement compared to previous years. It was reported that this change was due to a year-end adjustment of £400k and streamlined pass-through rates to providers.

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The HFG noted that the proposed funding rates for 2026/27 needed to be set by the end of February 2026. The rates had been discussed with the Early Years Funding Group, which had supported the proposed values put forward for the different funding streams.

It was acknowledged that a Quality Rate Funding Group had been established and that work on revising the quality rate was ongoing and would continue into the next financial year.

The HFG noted that the 2026/27 budget was expected to deliver a small surplus of £103k and that it was hoped that this would enable a contingency fund to be set up to manage future risks such as low birth rates and new funding streams.

RESOLVED that the HFG agreed that the proposed Early Years Block budget and funding rates should go forward to the Schools' Forum on 19th January for consideration and decision.

5 High Needs Block Budget Proposals (Lisa Potts)

Lisa Potts introduced the report, which set out the current financial position of the High Needs Block (HNB) budget for 2025/26 and the position as far as it can be predicted for 2026/27. The HFG noted the proposed budget for 2026/27 set out in paragraph 3.2 and Table 1 of the report, including the in-year and cumulative overspend. The main cost pressures related to top-up funding, particularly for independent special schools, and increasing demand for Education Other Than at School (EOTAS) packages.

It was noted that there was a calculation error in the table under paragraph 4.1 of the report and this would be corrected in time for the Schools' Forum. A line would also be added to the table providing the 2025 data.

The HFG noted that the budget included an estimated allowance for changes arising from the banding review, although final figures had not yet been agreed. It was acknowledged that mitigations were being implemented, including commissioning strategies, early intervention, and partnership working, to manage costs and reduce the rate of deficit growth.

The HFG discussed that for 2026/27 it was likely the Local Authority would have little ability to change the national funding formula. Therefore, proposals regarding adding weighting for EHCPs should be sent directly to the Department for Education and the present time was prime time to make that contact. It was noted that the LA would also be having these conversations with the DfE.

RESOLVED that:

- The table under paragraph 4.2 of the report, would be amended in time for the Schools' Forum meeting.
- The HFG noted the reported, which would go forward to the Schools' Forum on 19th January for discussion and comment.

6 Final DSG Funding Settlement Overview 2026/27 (Lisa Potts)

Lisa Potts introduced the report, which set out the final Dedicated Schools Grant (DSG) allocation for 2026/27. The HFG noted that the settlement had been received just before Christmas and was summarised in Table 3.1 of the report.

RESOLVED that the HFG noted the report that would go forward to the Schools' Forum on 19th January for discussion and comment.

7 Final School Funding 2026/27 (Edith Cheng)

Lisa Potts introduced the report, which set out the final school funding formula allocations for 2026/27. The HFG noted that the team had lost some key members of staff and this had resulted in a delay in being able to send the information out.

The final formula rates could be found in Appendix A and including allocations for deprivation, additional needs, and school-led funding elements. Appendix B provided the final funding allocations for schools for 2026/27. The HFG noted that clarification was being sought regarding the application of the Minimum Funding Guarantee, particularly for schools with increased pupil numbers but reduced per-pupil funding. It was explained that queries had been raised with regional colleagues and would be escalated to the DfE if necessary.

RESOLVED that the HFG noted the report which would go forward to the Schools' Forum on 19th January for discussion and comment. c

8 Growth Applications 2025/26 (Edith Cheng)

Lisa Potts introduced the report, which set out the position regarding the Growth Fund for 2026/27. The HFG noted that the annual process to invite applications from schools meeting the agreed growth criteria had been completed in early December. It was reported that no applications had been received and no schools were identified as meeting the criteria for additional funding.

RESOLVED the HFG noted the position of the Growth Fund for 2026/27 and the report that would go forward to the Schools' Forum on 19th January for discussion and comment.

9 Budgets for Additional Funds 2026/27 (Lisa Potts)

Lisa Potts confirmed that the paper on budgets for additional funds had not yet been finalised and would be circulated prior to the Schools' Forum meeting. It was noted that no significant changes were anticipated.

10 Any Other Business

There was no other business raised.

11 Date of the next Heads Funding Group meeting

The next HFG meeting would take place virtually on 13th May 2026.

(The meeting commenced at 3.30pm and closed at 4.10pm)

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Agenda Item 7

Draft Schools Forum Work Programme 2026/27

	Item	HFG Deadline	Heads Funding Group	SF Deadline	Schools Forum	Action required	Author
Term 5	Election of Chair and Vice-Chair 2026/27			09/06/2026	15/06/2026	Decision	
	Efficiency Planning			09/06/2026	15/06/2026	Discussion/Comment	Tony Parker
	School Balances 2025/26	06/05/2026	13/05/2026	09/06/2026	15/06/2026	Discussion/Comment	Edith Cheng
	DSG Outturn 2025/26			09/06/2026	15/06/2026	Discussion/Comment	Joshua Ngeresa
	Vulnerable Children's Fund - Annual Report for 2025/26			09/06/2026	15/06/2026	Discussion/Comment	Crystal Elkabbas
	Trade Union Facilities Time - Annual Report for 2025/26			09/06/2026	15/06/2026	Discussion/Comment	Richard Hand
	Scheme for Financing Schools Consultation 2026/27	06/05/2026	13/05/2026	09/06/2026	15/06/2026	Decision	Edith Cheng
Term 6	Scheme for Financing Schools 2026/27	no meeting		07/07/2026	13/07/2026	Decision	Edith Cheng
	Surplus Balances and School Balance Statements			07/07/2026	13/07/2026	Decision	Edith Cheng
	Deficit Schools			07/07/2026	13/07/2026	Discussion/Comment	Edith Cheng
Term 1	Schools Funding Formula Consultation 2027/28	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Decision	Edith Cheng
	Draft High Needs Budget Proposals 2027/28	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Joshua Ngeresa/Emma Ferrey
	Early Years Budget 2026/27 - In Year Position	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Joshua Ngeresa/Kirstie Hanson
	Education Budget Monitoring - Quarter 1	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Joshua Ngeresa
	DSG Monitoring 2026/27 - Quarter 2			06/10/2026	12/10/2026	Discussion/Comment	Joshua Ngeresa/Neil Goddard
	Deficit Schools	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Edith Cheng
	Draft De-delegations 2027/28	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Decision	Joshua Ngeresa
Term 2	School Funding Formula 2027/28	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Decision	Edith Cheng
	Budgets for Additional Funds 2027/28	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Decision	Edith Cheng
	Provisional DSG Funding Settlement Overview 2026/27	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Discussion/Comment	Edith Cheng
	Draft Central Schools Block Budget 2027/28	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Discussion/Comment	Joshua Ngeresa
	High Needs Block Budget Proposals 2027/28	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Discussion/Comment	Joshua Ngeresa/Emma Ferrey
	Final De-delegations 2027/28	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Decision	Joshua Ngeresa
Term 3	Work Programme 2027/28			12/01/2027	18/01/2027	Decision	Jessica Bailiss
	Early Years Funding Rates to Providers and 2027/28 Early Years Budget	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Decision	Joshua Ngeresa/ Kirstie Hanson
	Central School Block Budget Proposals 2027/28	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Decision	Joshua Ngeresa
	Final DSG Funding Settlement Overview 2027/28	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Edith Cheng
	Final School Funding 2027/28	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Edith Cheng
	Growth Fund Applications 2026/27	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Edith Cheng
	High Needs Block Budget Proposals 2027/28	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Joshua Ngeresa/Emma Ferrey
	Education Budget Monitoring - Quarter 2	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Joshua Ngeresa
	DSG Monitoring 2026/27 - Quarter 3			12/01/2027	18/01/2027	Discussion/Comment	Joshua Ngeresa/Neil Goddard
Deficit Schools	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Edith Cheng	

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Central Schools' Services Block Budget 2026/27

Report being considered by: Schools' Forum

Date of Meeting: 19th January 2026

Report Author:

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

1. Purpose of the Report

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

2. Recommendation

2.1 That the Central Schools Services Block is set with a deficit budget

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 The final allocation of funding for the Central Schools Services Block for 2026/27 is £1,109,940, which is a £42k or 3.9% increase on the previous year. Total costs are £1,175,587 which leaves a shortfall of £65,647.
- 4.3 The Central Schools Services Block grant is based on the number of pupils on the census multiplied by a rate set by the Department for Education (DFE). As the birth rate has been dropping, the level of grant has not increased in line with the staff costs, leaving a gap in the budget.
- 4.4 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:				
School Admissions	239,336	241,694	2,358	1%
National Copyright Licences	184,097	203,756	19,659	11%
Servicing of Schools Forum	55,158	55,874	716	1%
Education Welfare	246,411	248,350	1,939	1%
Support for Inclusion	-	64,670	64,670	
Statutory & Regulatory Duties:				
Provision of Education Data	187,008	197,578	10,570	6%
Finance Support for the Education Service	88,005	92,385	4,380	5%
Strategic Planning of the Education Service	67,450	71,280	3,830	6%
Total Budget Requirement	1,067,465	1,175,587	108,122	10.1%

Issue Identification

- 4.5 Whilst the rate set by the DFE has increased, the number of pupils on the census has been decreasing. The majority of the costs in the block are staff and systems costs, which increase year on year.

Central Schools' Services Block Budget 2026/27

	census (pupils)	DFE rate	£	
22/23	23139	42.87	991,947	
23/24	23285	41.80	973,313	
24/25	23053	42.14	971,453	
25/26	22800	46.84	1,067,952	Includes element for TPAG grant
26/27	22419	49.51	1,109,940	

4.6 The 2025/26 grant includes elements of a grant previously received separately.

4.7 The overall grant level has been decreasing for a number of years, making it difficult to balance the block.

Consultation and Engagement

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

Monitoring and Evaluation

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

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 The final allocation of funding for the Central Schools Services Block for 2026/27 is £1,109,940, which is a £42k or 3.9% increase on the previous year. Total costs are £1,175,587 which leaves a shortfall of £65,647.

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
	£	£	£	%
Budget Requirement:				
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Servicing of Schools Forum	55,158	55,874	716	1%
Education Welfare	246,411	248,350	1,939	1%
Support for Inclusion	-	65,470	65,470	
Statutory & Regulatory Duties:				
Provision of Education Data	187,008	197,578	10,570	6%
Finance Support for the Education Service	88,005	92,385	4,380	5%
Strategic Planning of the Education Service	67,450	71,280	3,830	6%
Total Budget Requirement	1,067,465	1,176,387	108,922	10.2%

Central Schools' Services Block Budget 2026/27

- 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.
- 5.6 The table below shows the 2026/27 budget required, with a funding shortfall of £65,647

Central Schools Services Block (CSSB)	2025/26 Budget	2026/27 Budget Requirement	Increase/ Decrease	Change
	£	£	£	%
Total Budget Requirement	1,067,464	1,175,587	108,122	10.1%
Funding:				
Central Schools Services Block DSG	-1,067,952	-1,109,940	41,988	3.9%
Surplus to fund shortfall on prior year deficit	488			
Deficit on 26/27 funding		-65,647		
Total Funding	-1,067,464	-1,175,587		
Balance	0	-0		

6. Conclusion

- 6.1 The expected costs for the Central Schools Services Block for 2026/27 is £1,176,3871, which is a £108,922 increase on 2025/26. We have reviewed all of the current costs needed to support these statutory services, but cannot see any way to reduce the current costs.
- 6.2 There is currently a statutory override in place for the whole of the DSG, with the High Needs Block being the main driver of this overspend. It is not yet known what will happen with the statutory override, but with costs increasing on the CSSB it is necessary to set a deficit on this block.
- 6.3 The deficit budget set out here represents the anticipated expenditure levels based on existing staffing and other commitments. This will be addressed throughout the year through vacancy management and improved commissioning processes. In this way, it is hoped that the deficit can be reduced or offset to deliver a balanced outturn at the financial year end. This will be managed within the broader context of the DSG deficit, and in particular the ongoing pressures on the High Needs block. A national strategy to manage pressures around schools funding and SEND is needed, and is expected in the coming year. It is hoped that this will provide a clear vision and deliver the funding required to support improved outcome for children and young people.

7. View from the Heads' Funding Group

- 7.1 Proposal agreed

8. Appendices

Appendix A – Details and Costs of Central Schools' Services

Appendix A

	Number of Posts	% Charged to CSSB	2026/27 £
School Admissions			
<u>Description of Statutory Duties covered</u>			
Administration of admissions process for maintained schools and academies			
<u>Staffing Structure</u>			
Admissions and Transport Manager	1.00	80%	
Admissions Officers	2.50	80%	
Admissions and Transport Officer	1.00	40%	
<u>Breakdown of Costs</u>			
Staff salary costs			172,160
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			241,694
Servicing the Schools Forum			
<u>Description of Statutory Duties covered</u>			
Setting agendas, minute taking, co-ordination and distribution of papers for Schools Forum and its sub groups			
<u>Staffing Structure</u>			
Service Director Education	1.00	10.00%	
Schools Finance Team	2.00	10.00%	
Schools Forum Clerk			
<u>Breakdown of Costs</u>			
Staff salary costs			49,820
Room hire, consumables and members expenses			1,610
Support Service Recharges			4,444
TOTAL ELIGIBLE EXPENDITURE FOR SERVICING THE SCHOOLS FORUM			55,874

Central Schools' Services Block Budget 2026/27

	Number of Posts	% Charged to CSSB	2026/27 £
Education Welfare			
Description of Statutory Duties covered			
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			
Staffing Structure			
Principal Education Welfare and Safeguarding Officer	1.00	40%	
Senior Education Welfare Officer	0.80	90%	
Education Welfare Officers	2.36	100%	
Breakdown of Costs			
Staff salary costs			218,119
Employee expenses/car allowances			4,400
Other non staffing costs			11,030
Income from fines			-27,130
Capita One Recharges			10,820
Support Service Recharges			31,111
TOTAL ELIGIBLE EXPENDITURE FOR EDUCATION WELFARE			248,350
Support for Inclusion			
Description of Statutory Duties covered			
The local authority must arrange suitable full-time education for the pupil to begin from the sixth school day after the			
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 parent			
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.			
Staffing Structure			
Staffing	1.00	100%	
Breakdown of Costs			
Staff salary costs			64,670
TOTAL ELIGIBLE EXPENDITURE FOR PROVISION OF EDUCATION DATA			64,670

Central Schools' Services Block Budget 2026/27

	Number of Posts	% Charged to CSSB	2026/27 £
Provision of Education Data			
<u>Description of Statutory Duties covered</u>			
Statutory returns to DfE			
Data analysis and reporting e.g. Exam results, performance			
School census administration and reports			
<u>Staffing Structure</u>			
Staffing	2.00	75%	
<u>Breakdown of Costs</u>			
Staff salary costs			98,890
Capita One recharge			85,355
Support Service Recharges			13,333
TOTAL ELIGIBLE EXPENDITURE FOR PROVISION OF EDUCATION DATA			197,578
Finance Support for the Education Service			
<u>Description of Statutory Duties covered</u>			
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			
<u>Staffing Structure</u>			
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%	
<u>Breakdown of Costs</u>			
Staff salary costs			77,570
Support Service Recharges			14,815
TOTAL ELIGIBLE EXPENDITURE FOR FINANCE SUPPORT			92,385
Strategic Planning of the Education Service			
<u>Description of Statutory Duties covered</u>			
Strategic planning and management of the Education service as a whole			
<u>Staffing Structure</u>			
Service Director Education	1.00	40%	
Other staffing	1.00	27%	
<u>Breakdown of Costs</u>			
Staff salary costs			71,280
TOTAL ELIGIBLE EXPENDITURE FOR PLANNING OF EDUCATION SERVICE			71,280

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Budget for Additional Funds 2026/27

Report being considered by: Schools' Forum
Date of Meeting: 19th January 2026
Report Author: Lisa Potts
Item for: Decision **By:** All Forum Members

1. Purpose of the Report

- 1.1 To set out the proposed 2026/27 budgets for the Growth Fund and Additional High Needs fund.
- 1.2 To note the updated Growth Funding Criteria 2026/27.

2. Recommendations

- 2.1 To note that the 2026/27 Department for Education (DfE) allocation for growth and falling rolls is retained as a surplus balance.
- 2.2 To set the Additional High Needs fund at £272k.

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		

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

4. Executive Summary

- 4.1 The formula for allocating growth funding to each local authority is based on the observed differences between the primary and secondary number on roll between the October 2024 and October 2025 school censuses. The growth is measured within each ‘middle layer super output area’ (MSOA). In West Berkshire there are 21 MSOAs. Changes in pupil numbers between the two censuses are identified for each MSOA, and any areas with a reduction in pupil numbers are discounted. Growth factor values are then applied:
- (1) £1,570 for each primary growth pupil
 - (2) £2,350 for each secondary growth pupil
 - (3) £77,225 for each new school which opened in the previous year.
- 4.2 The growth funding allocation for 2026/27 is £389,155.
- 4.3 Due to there being a deficit on the total Dedicated Schools Grant, the Department for Education have advised that the growth fund should be retained centrally.
- 4.4 2026/27 is the third year the DfE will allocate funding based on growth and falling rolls. LA’s continue to have discretion over whether to operate a falling rolls fund.
- 4.5 In 2026/27 West Berkshire did not meet the criteria to receive any falling rolls funding.
- 4.6 Funding needs to be set aside from the high needs block in order to fund those schools qualifying for additional high needs funding. This is where schools are supporting a disproportionate level of children with high needs.
- 4.7 It is proposed that the additional high needs funding is increased to £272k.

5. Introduction and background

- 5.1 The main formula funding a school receives is retrospective and based on pupil numbers from the previous October census. Growth funding is allocated by the Department for Education (DfE) by formula and forms part of the Schools Block DSG allocation. It is allocated to meet the cost of increases in pre-16 pupil numbers either in new schools or bulge classes set up to meet basic need.

- 5.2 The formula for allocating growth funding to each local authority is based on the observed differences between the primary and secondary number on roll between the October 2024 and October 2025 school censuses. The growth is measured within each 'middle layer super output area' (MSOA). In West Berkshire there are 21 MSOAs. Changes in pupil numbers between the two censuses are identified for each MSOA, and any areas with a reduction in pupil numbers are discounted. Growth factor values are then applied:
- (1) £1,570 for each primary growth pupil
 - (2) £2,350 for each secondary growth pupil
 - (3) £77,225 for each new school which opened in the previous year.
- 5.3 In 2024/25 the DfE allocated for the first time, funding based on growth and falling rolls. Falling rolls funding is allocated based on the reduction in pupil numbers that MSOAs within each local authority's experience. It is based on the differences between the primary and secondary number on roll in each MSOA in a local authority between the October pupil census (2025) and the census in the previous October (2024).
- 5.4 The growth funding allocation for 2026/27 is £389,155.
- 5.5 In 2026/27 West Berkshire did not meet the criteria to receive any falling rolls funding.
- 5.6 Funding is set aside annually from the high needs block to fund schools with a disproportionate number of high needs pupils that meet the agreed criteria.

6. Growth Fund

- 6.1 The Schools Forum must be consulted on the total size of the growth fund and criteria for use. The criteria formed part of the Schools Funding consultation and was supported.
- 6.2 The growth fund balance at 31.03.25 was £685k. Support for Highwood Copse as a new school has now finished, however, some of the allocated growth fund will need to be used annually to support Highwood Copse as a growing school. This is because the funding allocated by the DfE via the Authority Proforma Tool (APT) is based upon lagged pupil numbers and, as such, as an authority we will need to estimate and fund the increase in pupil numbers each year.
- 6.3 The table below shows the estimated draw on the growth fund up to 31.3.27. A contingency has been built in to cover two cases per year. This gives an estimated balance of £1.2m 31.03.27 prior to adding any 2026/27 growth allocation.

Budget for Additional Funds 2026/27

	Growth payments	Growth Funding	Balance
			-817,216
<i>Trinity 2023/24</i>	43,875		-773,341
<i>Highwood Underwriting</i>	33,345		-739,996
<i>Trinity 2024/25</i>	54,833		-685,166
Est Balance 31.03.25			-685,166
<i>Trinity 2025/26</i>	39,167		-645,999
<i>2025/26 DFE allocation</i>		-307,452	-953,451
Est Balance 31.03.26			-953,451
<i>2026/27 DFE allocation</i>		-389,155	-1,342,606
<i>Contingency</i>	150,580		-1,192,026
Est Balance 31.03.27			-1,192,026

- 6.4 In previous years, it was agreed that the projected balance of the growth fund was sufficient so new balances were added into the school formula and allocated to schools.
- 6.5 However, since 2025/26 the DFE have advised that as there is a deficit on the total Dedicated Schools Grant, the growth fund should be retained centrally.
- 6.6 A summary table is shown below:

Growth Fund	Top up £	Spend £	Cumulative Balance £
2019/20	655,800	183,048	665,962
2020/21	904,945	69,836	1,501,071
2021/22	0	217,640	1,283,431
2022/23	0	286,696	996,735
2023/24	0	179,519	817,216
2024/25	0	132,053	685,166
<i>2025/26 to date</i>	307,452	39,167	953,451
<i>2026/27 est</i>	389,155	150,580	1,192,029

7. Falling Rolls Fund

- 7.7 2026/27 is the third year the DfE will allocate funding based on growth and falling rolls. LA's continue to have discretion over whether to operate a falling rolls fund.
- 7.8 Where LA's operate a fund, they will only be able to provide funding where the most recent school capacity (SCAP) survey shows that school places are expected to be required in 2026/27, or the subsequent 2 years.
- 7.9 The decision as to whether a Falling Rolls fund should be reinstated formed part of the Schools Funding consultation. Although there was some support, the majority did not want a falling rolls fund. If it were to be reinstated then the Schools Forum would need to agree both the value of the fund and the criteria for allocation.
- 7.10 In 2026/27 West Berkshire did not meet the criteria to receive any falling rolls funding.

8. Additional High Needs Funding

8.1 Funding needs to be set aside from the high needs block in order to fund those schools qualifying for additional high needs funding. It is proposed that be increased to £272k.

Additional High Needs Funding	Budget £	Spend £
2018/19	100,000	87,500
2019/20	100,000	183,048
2020/21	100,000	69,836
2021/22	40,000	217,640
2022/23	42,000	286,696
2023/24	65,000	179,519
2024/25	150,000	230,302
2025/26	200,000	230,000
2024/25	272,000	

9. Conclusion

- Retain the 2026/27 Department for Education (DfE) allocation for growth and falling rolls centrally
- To set the Additional High Needs fund at £272k.

10. Appendices

10.1 Appendix A – Criteria for Growth Fund 2026/27.

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Appendix A

West Berkshire Council Schools Growth Fund Criteria 2026/27

1. Background

- 1.1 Growth funding allocated through the national funding formula (NFF) within each local authority's Schools Block.
- 1.2 The methodology to calculate growth funding was introduced in 2019/20 and has remained the same for the 2026/27 financial year. This means it will be based on the observed differences between the number on roll in each local authority between the October 2024 and October 2025 school censuses.
- 1.3 Growth is measured at middle layer super output area (MSOA) level to detect 'pockets' of growth, counting the increase in pupil numbers in each MSOA in West Berkshire between the two most recent October censuses.
- 1.4 The growth factor will be allocated at £1,570 per new primary pupil, £2,350 for each new secondary pupil plus a lump sum of £77,225 for each new school that opened in the previous year. The growth factor in the national funding formula is a proxy for overall growth costs at a local authority level. There is no expectation for local authorities to use these rates in their local arrangements for funding growth nor that spending on growth will match the sum allocated.
- 1.5 As growth funding is within the schools block, a movement of funding between the schools formula and the growth fund is not treated as a transfer between blocks. If funding is not required for growth, it can be added into the school formula, but if there is a shortfall, this needs to be met from a top slice of the main schools' block allocation. The amount of growth fund is subject to Schools Forum approval.
- 1.6 Local authorities must produce criteria for allocating growth funding, to be agreed by the Schools Forum. The criteria should contain clear objective trigger points for qualification and a clear formula for calculating allocations with these criteria applying to all schools on the same basis. This will be checked by ESFA for compliance with the annually made School and Early Years Finance (England) Regulations, to check that it provides a transparent and consistent basis for the allocation of funding, which may be different for each phase.
- 1.7 Any unspent growth funding remaining at the year-end should be reported to the Schools Forum. Funding may be carried forward to the following funding period, as with any other centrally retained budget, and can choose to use it specifically for growth if the authority wishes. Any over spent growth funding will form part of the overall DSG surplus or deficit balance.

2. Purpose

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

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

2.2 The growth fund may only be used to:

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

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

3. **Growth Fund Criteria**

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

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

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

Additional Class Funding Primary

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

- 3.4 Funding will be £77,000 (equivalent to 20 pupils x basic needs entitlement including ACA). The funding amount provided should be sufficient to cover the cost of a TMS6 teacher with on-costs, one TA, plus other costs.
- 3.5 Maintained primary schools will receive funding for the period September to March (7/12ths equivalent to £44,920)
- 3.6 The number of years this funding will be paid will depend on whether the growth is permanent or temporary. For example, an infant school that changes from a 2 form entry to a 3 form entry from September 2026 will typically receive growth funding in 2026/27, 2027/28 and 2028/29.

Secondary Schools Funding

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

KS1 Classes (infant class size)

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

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

New School

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

Examples of Infant Class Size Additional In-Year Funding

Example 1

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

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

Example 2

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

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

Example 3

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

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

Example 4

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

The school were running and funding 2 classes before the September admissions took them over 60 pupils. Additional in-year funding would therefore be payable for the additional class, and the additional 12 pupils will generate enough funding to sustain the cost of the additional teacher from April 2026.

Early Years Budget & Rates 2026/27

Report being considered by: Schools' Forum
Date of Meeting: 19th January 2026
Report Author: Beth Kelly & Lisa Potts
Item for: Decision **By:** All Forum Members

1. Purpose of the Report

1.1 To set out the proposal for the Early Years budget 2026/27, which is based upon the recommendations of the Early Years Funding Group.

2. Recommendation

- 2.1 To agree the hourly rates for Early Years entitlement for 2026/27.
- 2.2 That the Early Years DSG budget for 2026/27 to be set at the level detailed in the budget model and agreed.

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 At the Spring Budget 2023, the government announced the 30 hours entitlement will be extended in stages from April 2024 to children aged nine months to three years by 2027/28.
- 4.2 The DFE have asked that we publish our rates to providers by 27th February 2026. Below is a summary of the proposed rates:

	Local authority rates for 2026/27
3 & 4 year old funding rate (per hour)	£6.95
2 year old funding rate (per hour)	£9.35
Under 2 year olds funding rate (per hour)	£12.74
Disability Access Fund (DAF) (per child)	£975.00
Early Years Pupil Premium (per hour)	£1.15

- 4.3 Historically, the Early Years Block has carried a deficit balance. Since the introduction of additional funding for children aged 9 months and over, there has been a phased approach to the funding. This phased approach and lower central spend has reduced the deficit on the block to a forecast £180k deficit for the end of 25/26.
- 4.4 Using the provider rates in 4.2, the 26/27 Budget proposals are summarised below:

	2026/27 £
- Funds Delegated to Early Years Providers	31,367,950
Centrally Managed Funds	888,896
Early Years DSG Block Funding In Year	-32,561,106
In year overspend (under spend)	-304,260
Early Years Block Forecast Deficit from 25/26	180,320
OVERALL NET SURPLUS POSITION	-123,940

Issue Identification

4.5 There is uncertainty in this sector as the new entitlements take time to settle, but also a decline in the birth rate. Once the deficit has been recovered, we would like to set a small contingency budget to allow for these uncertainties.

Consultation and Engagement

4.6 The Early Years Funding Group has been consulted on the 26/27 rates being proposed in 4.2

Monitoring and Evaluation

4.7 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 Since the introduction of funding for children from 9 months of age, it has been a challenge to forecast the current costs and expected level of grant as there isn't the historical data.

5.2 Provisional 2025/26 outturn figures are shown below and detail a large recovery on the previous deficit. The main reasons behind recovering the deficit are:

- Ensuring the pass through rate is set at the minimum requirement as per the DFE guidelines
- Adjustment for 24/25 grant was larger than expected, in our favour
- As the grant level has increased, the amount the local authority can spend on central costs has not increased – therefore bringing down the overall spend.

	2025/26 Budget Set £	2025/26 Change in budget £	2025/26 Revised budget £	2025/26 Forecast £	2025/26 Variance £
Funds Delegated to Early Years Providers	26,121,394	139,345	26,260,739	26,260,740	1
Centrally Managed Funds	821,467	0	821,467	765,102	-56,365
Early Years DSG Block Funding In Year	-27,240,311	-139,345	-27,379,656	-27,379,656	0
In year overspend (under spend)	-297,450	0	-297,450	-353,814	-56,364
Early Years funding adjustment from 24/25	0	0	0	-392,030	-392,030
Early Years DSG Block Overspend from previous year	903,719	0	903,719	926,164	22,445
FORECAST CUMULATIVE DEFICIT AT YEAR END	606,269	0	606,269	180,320	-425,949

6. The funding rate Framework for 2026/27

6.1 At the Spring Budget 2023, the government announced the 30 hours entitlement will be extended in stages from April 2024 to children aged nine months to three years by 2027/28. The new entitlements were rolled out in stages –

Early Years Budget & Rates 2026/27

- From April 2024, all working parents of 2 year olds can access 15 hours per week
- From September 2024, all working parents of children ages 9 months up to 3 years can access 15 hours per week
- From September 2025, all working parents of children aged 9 months to 3 years old can access 30 hours free childcare per week.

6.2 2026/27 Grant funding rates from central government to West Berkshire Council are shown in the table below:

	Local authority rates for 2026/27
3 & 4 year old funding rate (per hour)	£6.95
2 year old funding rate (per hour)	£9.35
Under 2 year olds funding rate (per hour)	£12.74
Disability Access Fund (DAF) (per child)	£975.00
Early Years Pupil Premium (per hour)	£1.15

7. Funding Rates for providers 2026/27

7.1 The DFE have asked that we publish our rates to providers by 27th February 2026.

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

	Provider funded rates for 2025/26	Provider funded rates for 2026/27	% uplift
3 & 4 year old funding rate (per hour)	£5.78	£6.27	7.5%
3 & 4 year old quality rate (per hour)	£0.60	£0.60	0%
2 year old funding rate (per hour)	£8.68	£9.06	4.3%
Under 2 year olds funding rate (per hour)	£11.79	£12.33	4.6%
Disability Access Fund (DAF) (per child)	£938.00	£975.00	3.9%
Early Years Pupil Premium (per hour)	£1.72	£1.92	11.6%

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

7.4 The Early Years Pupil Premium is made up of £1.15 grant plus a 77p deprivation supplement for all funding streams.

7.5 The Local Authority is allowed to fund from the grant some centrally provided services, including staffing and IT costs in relation to overseeing the delivery of the free entitlement, sufficiency of places, eligibility checking, and administration of funding payments to providers. However funding for these services is limited by the requirement to set a pass-through rate for all funding streams which is at least 97% of

Early Years Budget & Rates 2026/27

the authority's funding rate. The rates detailed in 7.2 are within the required pass through rate set by the DFE and the Early Years Funding Group have been consulted.

8. Budget Model for 2026/27

8.1 We are now in the fifth year of the funding announced in the Spending Review in October 2021. The below table includes provision for additional hours for the new funding streams as they extend to a full year.

	2026/27 £
Funds Delegated to Early Years Providers	
PVI Providers (90036)	8,026,470
Nursery classes in Mainstream Schools (90037)	2,172,490
Maintained Nursery Schools (90010)	1,210,280
2 Year Old Funding (90018)	762,610
2 Year old working parents	6,331,290
Additional 2 year old working parents hours to adjust for new 30 hour entitlement	2,213,870
Under 2's (90023)	8,465,770
Additional under 2 year old working parents hours to adjust for new 30 hour entitlement	1,769,040
Pupil Premium Grant and deprivation funding (90052)	416,130
Total Delegated Funds	31,367,950
Centrally Managed Funds	
Central Expenditure on Children Under 5 (90017)	455,780
Early Development Intervention Team (EDIT) (90287)	114,080
SEN Inclusion Fund (90238)	108,000
Disability Access Fund (90053)	119,925
SSRs	91,111
Total Centrally Managed Funds	888,896
TOTAL EXPENDITURE	32,256,846
Early Years DSG Block Funding In Year	-32,561,106
In year surplus	-304,260
Early Years DSG Block Funding carried forward	£180,320
OVERALL NET SURPLUS POSITION	-123,940

9. Conclusion

- 9.1 The rates shown at 7.2 are the minimum we can pass through to providers, based on DFE guidelines
- 9.2 The increase in overall grant has allowed the previous deficit to be reduced considerably.

10. View from the Heads' Funding Group

Proposal agreed

11. Appendices

Dedicated Schools Grant 2026/27: Final Allocations

Report being considered by: Schools' Forum

Date of Meeting: 19th January 2026

Report Author:

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

1. Purpose of the Report

1.1 To set out the final Dedicated Schools Grant (DSG) allocation for 2026/27.

2. Recommendation

2.1 To note the funding allocation.

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 DFE provides a breakdown of the future year funding in December. This information is collated and a comparison with the previous year is tabled below:

DSG Final Allocation	Schools Block (Including growth) £m	High Needs Block (before deductions) £m	Central Schools Services Block £m	Early Years Block £m	Total £m
2026/27 total funding	149.06	32.48	1.11	32.92	215.57
<i>2025/26 total funding</i>	<i>143.57</i>	<i>30.83</i>	<i>1.07</i>	<i>27.70</i>	<i>203.16</i>
<i>Change from last year</i>	<i>5.50</i>	<i>1.65</i>	<i>0.04</i>	<i>5.22</i>	<i>12.41</i>
<i>Percentage change</i>	<i>3.8%</i>	<i>5.4%</i>	<i>4.0%</i>	<i>18.8%</i>	<i>6.1%</i>
Deductions for NNDR and direct funding of High Needs places	-1.93	-3.48	0.00	0.00	-5.41
2026/27 allocations after deductions	147.14	29.00	1.11	32.92	210.16

Final Allocations

4. Introduction and background

- 4.1 The National Funding Formula (NFF) is used by the Department for Education (DfE) to calculate the blocks within the Dedicated Schools Grant (DSG) and was finalised in December 2025.
- 4.2 The DSG consists of four blocks: Schools, High needs, Central School Services and Early Years.
- 4.3 The following table shows the 2026/27 DSG final allocation based on the October 2025 census pupil numbers.

DSG Final Allocation	Schools Block (Including growth)	High Needs Block (before deductions)	Central Schools Services Block	Early Years Block	Total
	£m	£m	£m	£m	£m
2026/27 total funding	149.06	32.48	1.11	32.92	215.57
<i>2025/26 total funding</i>	<i>143.57</i>	<i>30.83</i>	<i>1.07</i>	<i>27.70</i>	<i>203.16</i>
<i>Change from last year</i>	<i>5.50</i>	<i>1.65</i>	<i>0.04</i>	<i>5.22</i>	<i>12.41</i>
<i>Percentage change</i>	<i>3.8%</i>	<i>5.4%</i>	<i>4.0%</i>	<i>18.8%</i>	<i>6.1%</i>
Deductions for NNDR and direct funding of High Needs places	-1.93	-3.48	0.00	0.00	-5.41
2026/27 allocations after deductions	147.14	29.00	1.11	32.92	210.16

5. Schools Block

- 5.1 2026/27 is the fourth year of the transition to the direct NFF for schools. In 2026/27, local authorities will only be allowed to use NFF factors in their local formulae. Local authorities will also be required to move their local formulae factors 10% closer to the NFF values, compared to where they were in 2025/26, unless they are already mirroring the NFF.
- 5.2 The final allocation for 2026/27 (based on October 2025 census data) is shown below:

Schools Block	2025/26 Total funding	2026/27 Final		
		Unit of funding	Number of pupils	Total funding
Primary	69,029,902	5,916.06	12,061	71,350,642
Secondary	72,332,417	7,278.97	10,358	75,395,571
Premises factor (NNDR)	1,896,510			1,929,022
DfE allocation	143,258,830			148,675,235
Growth	307,452			389,155
Total block funding	143,566,283			149,064,390
Block transfer (0%)	-			-
Total formula funding	143,566,283			149,064,390
NNDR direct allocation	- 1,929,400			- 1,929,022
Total schools block after deductions	141,636,883			147,135,368

6. High Needs Block

- 6.1 The 2026/27 allocation for West Berkshire is £32.48m, before deductions for direct funding of places an increase of £1.65m from last year (5.4%).

Final Allocations

7. Central Schools Services Block (CSSB)

- 7.1 The CSSB within the DSG provides funding for local authorities to carry out central functions on behalf of maintained schools and academies. This covers Statutory and Regulatory duties, Education Welfare, asset management and other duties such as licences, admissions and servicing of Schools' Forum.
- 7.2 The CSSB DSG funding for 2026/27 is £1.11m, an increase of 4% from last year.

8. Early Years Block

- 8.1 The Early Years formula was introduced in 2017-18 with new funding rates to local authorities, and a revised simplified formula for allocating funding to providers was also brought in. All providers are now on the same rates.
- 8.2 Funding for 2026/27 is £32.92m. The increase in funding is due to expansion of entitlements for working parents which increased to 30 hours from September 2025 for children over 9 months old.

9. Appendices

None

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High Needs Block (HNB) Budget 2026/27

Report being considered by: Schools' Forum
Date of Meeting: 19th January 2026
Report Author: Lisa Potts/ Vanessa Grizzle/ Melissa Perry/ Emma Ferrey
Item for: Discussion/Comment **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 note and provide feedback on the HNB budget for 2026-27.

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

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 **£49,453,588**. The in year overspend is predicted to be **£16,976,981** and the total cumulative overspend will be **£47,876,191**

TABLE 1	2025/26 Budget £	2025/26 Forecast £	2026/27 Estimate £
Place Funding	7,190,603	7,096,100	7,079,992
Top Up Funding	30,161,070	30,504,743	33,834,714
PRU Funding (top ups only)	2,451,840	2,429,975	2,620,770
Other Statutory Services	2,893,880	3,194,635	3,677,694
Non Statutory Services	1,994,845	1,868,620	2,024,950
Support Service Recharges	175,072	175,072	215,467
Total Expenditure	44,867,310	45,269,145	49,453,588
HNB DSG Allocation	-30,825,286	-30,723,286	-32,476,607
In year overspend	14,042,024	14,545,859	16,976,981
HNB DSG Overspend from previous year	17,059,882	16,353,351	30,899,210
Total cumulative deficit	31,101,906	30,899,210	47,876,191

- 3.4 There are new specialist and resourced provisions in development. Castle School is expanding it's PAN by 32 pupils from January 2026. Westwood Farm are currently consulting on expanding their current resource provision for children with complex needs from 12 places to 18 places. We are also developing specialist nursery provision at Victoria Park for three and four year olds. This provision will start with four children, likely to be in September 2026, and increasing over time to around 12 (final numbers are still to be agreed, depending on footprint of the rooms available) by the third year of operation.
- 3.5 SEN and place planning teams are working together to analyse needs from projection data and identify options for meeting those needs, ideally across mainstream schools. This will ensure we are ready to meet the requirements which we expect to be set out in the new White Paper.

Issue Identification

- 3.6 The budget demands on the High Needs Block are higher than the allocated grant from the DFE. This is causing a deficit budget to be set for 26/27 of £17m. There is already an estimate of £30.9m from 2025/26 and previous years.

Consultation and Engagement

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

Monitoring and Evaluation

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

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.

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	11%	430,697	22%
2021	1198	23%	473,255	34%
2022	1322	36%	517,049	46%
2023	1532	58%	575,963	63%
2024	1685	74%	638,700	80%
2025	1893	95%		

- 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 2023 was 1532 compared to 971 in 2018, a rise of 58% in five years. 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 **£49,453,588**. The in year overspend is predicted to be **£16,976,981** and the total cumulative overspend will be **£47,876,191**

TABLE 1	2025/26 Budget £	2025/26 Forecast £	2026/27 Estimate £
Place Funding	7,190,603	7,096,100	7,079,992
Top Up Funding	30,161,070	30,504,743	33,834,714
PRU Funding (top ups only)	2,451,840	2,429,975	2,620,770
Other Statutory Services	2,893,880	3,194,635	3,677,694
Non Statutory Services	1,994,845	1,868,620	2,024,950
Support Service Recharges	175,072	175,072	215,467
Total Expenditure	44,867,310	45,269,145	49,453,588
HNB DSG Allocation	-30,825,286	-30,723,286	-32,476,607
In year overspend	14,042,024	14,545,859	16,976,981
HNB DSG Overspend from previous year	17,059,882	16,353,351	30,899,210
Total cumulative deficit	31,101,906	30,899,210	47,876,191

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

Cost Centre	Description	Proposed Budget 2026/27
90539	Special Schools Maintained	6,829,740
90548	Non WBC special schools	288,140
90554	Non WBC free schools	600,725
90617	Resource Units Maintained	725,120
90026	Resource Units Academies	1,310,330
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	680,880
90625	PRU Top Up Funding	1,340,190
90628	PRU EHCP SEMH Placements	1,280,580
	High Needs Block: Top Up Funding Total	36,455,485
90540	Special Schools	1,680,000
90546	Special Schools - Place Funding Post 16	340,000
Top Slice	Special Schools Academies (DSG Top slice)	2,180,000
90584	Resourced Units - Place Funding	282,000
90552	Special Schools and PRU Teachers Pay and Pension	349,992
Top Slice	Resource Units Academies – pre16	580,000
90551	Mainstream Maintained - post 16 SEN places	48,000
Top Slice	Mainstream Academies – post 16	42,000
Top Slice	Further Education	678,000
90320	Pupil Referral Units	900,000
	High Needs Block: Place Funding Total	7,079,992
90573	Education Other Than At School (EOTAS)	480,980

90574	Spot Purchase Alternative provision	453,160
90290	Sensory Impairment	306,196
90577	SEN Commissioned Provision	909,353
90565	Equipment for SEN Pupils	20,000
90295	Therapy Services	671,285
90288	Elective home Education Monitoring	85,910
90282	Medical Home Tuition	517,820
90610	Hospital Tuition	36,180
90281	SEND Strategy (DSG)	80,360
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	403,980
90830	ASD Advisory Service	288,440
90372	Therapeutic Thinking	113,550
90287	Early Development and Inclusion Team	114,080
90581	Dingley's Promise	155,000
90373	Emotionally Based School Avoidance (EBSA)(WBC Led)	153,720
90237	Emotionally Based School Avoidance (EBSA) (school led)	110,960
	Early Intervention Support Fund	276,040
90374	SEMH Practitioner	53,720
	SEMH Re-integration Practitioner	49,790
	High Needs Block: Non Top Up or Place Funding	5,702,644
	SSR	215,467
	High Needs Block Total	49,453,588

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 **£228,010**
- Increased cost of EOTAS provision of **£201,510**
- PRU - increased budget requirement of **£168,930** 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

Proposal agreed

7. Appendices

7.1 Appendix A - High Needs Budget Detail

7.2 Appendix B - Historical Data

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	168	1,680,000
Special Schools – post 16	34	340,000		34	340,000
Special Schools Academies (DSG Top slice)	218	2,180,000		218	2,180,000
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	587,500	104	94	580,000
Mainstream Maintained post 16	8	48,000	20	8	48,000
Mainstream Academies – post 16 (DSG top slice)	10	48,000	25	7	42,000
Further Education	131	714,000		113	678,000
i-college Place Funding	86	860,000	90	90	900,000
TOTAL	799	7,096,100		765	7,079,992

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 Top Up Budgets	2025/26 Budget				2026/27	Difference 25/26 budget & 26/27 prediction
	Budget £	Forecast £ (Month 9)	Over/ (under) £	Current pupils receiving top up (Nov25)	Estimate £	
Special Schools Maintained	6,601,730	6,398,320	-203,410	287	6,829,740	+228,010
Non WBC special schools	257,870	334,070	76,200	14	288,140	+30,270
Non WBC free schools	504,750	877,250	372,500	31	600,725	+95,975
Resource Units Maintained	725,120	675,300	-49,820	35	725,120	0
Resource Units Academies	1,297,350	1,250,000	-47,350	96	1,310,330	+12,980
Resource Units Non WBC	43,720	60,953	17,233	4	48,180	+4,460
Mainstream Maintained	2,039,520	2,205,000	165,480	410	2,494,000	+454,480
Mainstream Academies	1,199,630	1,150,000	-49,630	251	1,373,620	+173,990
Mainstream Non WBC	124,980	160,160	35,180	28	130,700	+5,720
Non Maintained Special Schools	1,456,230	1,540,130	83,900	17	1,218,080	-238,150
Independent Special Schools	11,425,820	11,695,000	269,180	168	13,938,950	+2,513,130
Further Education	1,726,810	1,594,890	-131,920	148	1,743,880	+17,070
Disproportionate HN Pupils	200,000	230,000	30,000		272,000	+72,000
SEMH Provision Castle at Theale	1,901,700	1,677,830	-223,870	38	2,180,371	+278,671
New Kennet Valley Resource	655,840	655,840	0	12	680,880	+25,040
TOTAL	30,161,070	30,504,743	343,673	1,539	33,834,714	+3,673,644

2.2 Maintained Special Schools

There will be an increase in costs of £228,010 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 9)	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	1,280,580	+25,110
TOTAL	2,451,840	2,462,260	10,420	2,620,770	+168,930

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 9)	Over/ (under) £	Estimate £	Difference 25/26 budget & 26/27 prediction
Education Other Than At School (EOTAS)	279,470	424,520	145,050	480,980	+201,510
Spot Purchase Alternative provision	376,090	609,000	232,910	453,160	+77,070
Sensory Impairment	251,220	292,340	41,120	306,196	+54,976
SEN Commissioned Provision	722,336	782,985	60,649	909,353	+187,017
Equipment for SEN Pupils	20,000	15,000	-5,000	20,000	0
Therapy Services	614,680	614,680	0	671,285	+56,605
Elective home Education Monitoring	72,360	56,310	-16,050	85,910	+13,550
Medical Home Tuition	403,760	278,730	-125,030	517,820	+114,060
Hospital Tuition	36,180	6,800	-29,380	36,180	0
SEND Strategy (DSG)	75,140	71,630	-3,510	80,360	+5,220
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	3,194,635	300,759	3,677,694	+783,818

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 £278,580.

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.

TABLE 5 Non Statutory Services	2025/26 Budget			2026/27	
	Budget £	Forecast £ (Month 9)	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	336,670	-58,440	403,980	+8,870
ASD Advisory Service	273,440	318,010	44,570	288,440	+15,000
ASD Fund - Additional support	52,690		-52,690	0	-52,690
Therapeutic Thinking	76,700	64,060	-12,640	113,550	+36,850

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	125,330	-26,025	114,080	-37,275
Dingley's Promise	125,000	125,000	0	155,000	+30,000
Emotionally Based School Avoidance (EBSA)	144,520	140,760	-3,760	153,720	+9,200
EBSA (Academies)	110,960	110,960	0	110,960	0
Early Intervention Support Fund	0	0	0	276,040	+276,040
Transition project - part funded DBV	46,310	46,310	0	0	-46,310
SEMH Practitioner	52,240	37,000	-17,240	53,720	-520
SEMH Re-integration Practitioner	0			49,790	+49,790
Extension of i-college – included in place funding 26/27	90,000	90,000	0	0	-90,000
TOTAL	1,994,845	1,868,620	-126,225	2,024,950	+30,105

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 £155,000. 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			
Top Up Funding	2022/23 £	2023/24 £	2024/25 £
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			
PRU Funding	2022/23 £	2023/24 £	2024/25 £
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			
Other Statutory Services	2022/23 £	2023/24 £	2024/25 £
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

Dedicated Schools Grant Monitoring Report 2025/26 – Quarter Three

Report being considered by: Schools' Forum
Date of Meeting: 19th January 2026
Report Author: Lisa Potts
Item for: Discussion/Comment **By:** All Forum Members

1. Purpose of the Report

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

2. Recommendation

- 2.1 That the report be noted.

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

3. Introduction and background

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

4. Supporting information

- 4.1 The 2025/26 Dedicated Schools Grant allocation is £203.1m. This includes £64m which funds Academies and post-16 high needs places which is paid direct by the

Education and Skills Funding Agency (ESFA) to schools. The DSG budget for 2025/26 has been built utilising the remaining grant.

- 4.2 The Schools block is ring fenced but the Local Authority can transfer up to 0.5% of the funding out of the schools block with Schools Forum agreement. The other blocks are not subject to this limitation on transfers. For the 2025/26 budget, no balances were transferred between the blocks.
- 4.3 The DSG expenditure budgets required for 2025/26 total £156.3m, which is £14m more than the funding available. This is due to a rising demand for high needs provision, there is a lack of sufficient maintained SEN places and so more use is having to be made of independent non maintained schools, with significant cost implications. There are also pressures on top up funding allocations. As a result, a £14m in-year efficiency target has been set against the High Needs Block, in order to balance the DSG budget.
- 4.4 There is a brought forward deficit on the DSG of £16.1m.
- 4.5 The forecast position at the end of December is shown in Table 1. A more detailed position per cost centre is shown in Appendix A.

Prior Years				Table 1 - DSG Block forecast 2025/26	2025/26						
2021/22 Outturn	2022/23 Outturn	2023/24 Outturn	2024/25 Outturn		Original Budget	Budget Changes	Final Budget	Quarter 1 Forecast	Quarter 2 Forecast	Quarter 3 Forecast	Deficit/ (surplus)
£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
				Expenditure:							
70,512	73,090	77,070	77,955	Schools Block (inc ISB)	84,640	90	84,730	84,640	84,577	84,730	(0)
9,899	10,240	11,325	19,878	Early Years Block	27,240	139	27,380	27,204	26,895	27,026	(354)
1,001	967	935	950	Central School Services Block	1,068	0	1,068	1,063	1,094	1,059	(9)
23,827	26,456	31,157	36,344	High Needs Block	43,421	(2,188)	41,234	43,044	41,499	41,737	504
0	0	0	0	High Needs Block In-Year deficit recovery	(14,040)	0	(14,040)	0	0	0	14,040
105,240	110,754	120,487	135,127	Total Expenditure	142,329	(1,958)	140,371	155,951	154,065	154,552	14,181
				DSG Grant Income:							
(70,293)	(72,937)	(77,005)	(78,106)	Schools Block	(84,640)	(90)	(84,730)	(84,640)	(84,577)	(84,730)	0
(9,834)	(10,102)	(11,115)	(20,214)	Early Years Block	(27,240)	(139)	(27,380)	(27,240)	(27,204)	(27,380)	0
(1,009)	(992)	(973)	(951)	Central School Services Block	(1,068)	0	(1,068)	(1,068)	(1,068)	(1,068)	0
(22,601)	(24,983)	(26,892)	(27,750)	High Needs Block	(29,381)	2,188	(27,194)	(29,381)	(27,206)	(27,194)	0
(103,737)	(109,014)	(115,985)	(127,020)	Total DSG Income	(142,329)	1,958	(140,371)	(142,329)	(140,054)	(140,371)	(1,958)
	(53)			In-year adjustments							
(103,737)	(109,067)	(115,985)	(127,020)	Total Income	(142,329)	1,958	(140,371)	(142,329)	(140,054)	(140,371)	(1,958)
				In year net deficit/(surplus):							
219	153	65	(151)	Schools Block	0	0	0	(0)	(0)	(0)	(0)
65	138	210	(335)	Early Years Block	0	0	0	(37)	(309)	(354)	(354)
(8)	(25)	(38)	(2)	Central School Services Block	0	0	0	(5)	26	(9)	(9)
1,227	1,474	4,265	8,594	High Needs Block	0	0	0	13,663	14,293	14,544	14,544
	(50)	39		Grant adjustment (re PPG)							
1,503	1,689	4,541	8,107	Net In-year Deficit	0	0	0	13,622	14,010	14,181	14,181
1,461	2,964	4,761	9,450	Deficit Balance in reserves	16,133		16,133	16,133	16,133	16,133	16,133
	108	148	94	In year reserve movement (Schools)	0		0	57	57	57	57
	0	0	(1,518)	In year reserve movement (Early Years)	0		0	0	0	(392)	(392)
2,964	4,761	9,450	16,133	Cumulative Deficit	16,133	0	16,133	29,811	30,200	29,979	29,979

- 4.6 The Quarter Three forecast shows an in-year forecast deficit of £13.8m versus budget, this includes the in-year efficiency target. When added to the cumulative deficit of £16.1m, the forecast year end deficit on the DSG is £29.9m.
- 4.7 With new funding streams in 2025/26 within the Early Years Block it is difficult to forecast accurately. We are allowed to retain 4% of the Early Years Block for centrally managed spend. We are forecasting spend lower than the 4% allowed, which will go towards reducing the deficit on the block. There is also an adjustment in relation to the end of 24/25 which has brought the deficit figure down to £180k over.

- 4.8 The High Needs Block is currently showing a £504k overspend at Quarter Three against the budget. We have seen a budget change in relation to the place funding for Brookfields, now that they are an academy the funds are sent direct from the DFE.
- 4.9 The High Needs Block in year deficit recovery target of £14m is a balancing figure between the budget set and the funding received. There is currently no savings being forecast against this. We are seeing increasing costs in the Independent Special Schools Top Ups being offset by reduced costs in the Medical Tuition Service.
- 4.10 The table below shows the forecast position for the end of 2025/26 by block. The surplus balance on the Schools Block of £1m is supporting the forecast overspend position on the other blocks.

Reserve Balances (surplus)/deficit	1.4.2025 Actual	Change in reserves	In-year Deficit/ (Surplus)	31.3.2026 Forecast
Schools Block - growth fund	(729)	0	0	(729)
Schools Block De-delegated	(321)	57	0	(264)
Schools Block - other	(97)	0	0	(97)
Early Years Block	926	(392)	(354)	180
Central School Services Block	(1)	0	(9)	(10)
High Needs Block	17,872	0	14,544	32,415
Clawback from Schools	(1,518)	0	0	(1,518)
Total Deficit Balance	16,133	(335)	14,181	29,979

5. Conclusion

- 5.1 The total forecast deficit on the DSG amounts to £30.4m, comprising £16.1m from previous years and a further £14.2m forecast overspend in year. The forecast position will be kept under review and updates provided.

6. Appendices

- 6.1 Appendix A – DSG 2025-26 Budget Monitoring Report Month 9

Dedicated School's Grant (DSG) 2025/2026 Budget Monitoring Quarter Three							
Cost Centre	Description	Original Budget 2025/26	Net Virements in year	Amended Budget 2025/26	Actual	Variance	Comments
90020	Primary Schools (excluding nursery funding)	60,640,630	-39,540	60,601,090	60,601,095	5	
DSG top slice	Academy Schools Primary	0		0	0	0	
90025	Secondary Schools (excluding 6th form funding)	23,012,980	-23,600	22,989,380	22,989,375	-5	
DSG top slice	Academy Schools Secondary	0		0	0	0	
90230	DD - Schools in Financial Difficulty (primary schools)	0		0	0	0	
90113	DD - Trade Union Costs	66,270		66,270	66,270	0	
90255	DD - Support to Ethnic minority & bilingual Learners	170,500		170,500	170,500	0	
90349	DD - Behaviour Support Services	261,330		261,330	261,330	0	£3.3k budget for project not used. £3.6k underspend on salaries (multiple vacancies offset with some of VG agency time).
90424	DD - CLEAPSS	3,420		3,420	3,420	0	
90470	DD - School Improvement	310,390		310,390	310,390	0	
90423	DD - Statutory & Regulatory Duties	135,820		135,820	135,820	0	
90235	School Contingency - Growth Fund/Falling Rolls Fund	0	153,170	153,170	153,170	0	
90054	De-delegated funding from reserves	-56,850		-56,850	-56,854	-4	
	SSR	95,227		95,227	95,227	0	
	Schools Block Total	84,639,717	90,030	84,729,747	84,729,743	-4	
90583	National Copyright Licences	184,100		184,100	210,960	26,860	
90019	Servicing of Schools Forum	50,590		50,590	48,870	-1,720	
90743	School Admissions	214,210		214,210	199,330	-14,880	Release of some casual worker balance as overtime has not materialised to date. Left a bit in to cover last 3 months based on 5 year rolling average
90354	ESG - Education Welfare	214,440		214,440	195,800	-18,640	Higher FPN income
90460	ESG - Statutory & Regulatory Duties	313,920		313,920	313,920	0	
90054	Surplus budget to off-set cumulative deficit	470		470		-470	
	SSR	90,210		90,210	90,210	0	
	Central School Services Block DSG	1,067,940	0	1,067,940	1,059,090	-8,850	
90010	Early Years Funding - Nursery Schools	1,239,660	-34,090	1,205,570	1,205,570	0	
90037	Early Years Funding - Maintained Schools	2,375,750		2,375,750	2,375,750	0	
90036	Early Years Funding - PVI Sector	7,783,440	114,380	7,897,820	7,897,820	0	
90052	Early Years PPG & Deprivation Funding	341,800	19,735	361,535	361,530	-5	
90053	Disability Access Fund	107,870		107,870	67,870	-40,000	
90018	2 year old funding	6,371,460	110,410	6,481,870	6,481,870	0	
90023	Under 2s	8,009,290	-71,090	7,938,200	7,938,200	0	
90017	Central Expenditure on Children under 5	442,390		442,390	439,360	-3,030	
90287	Pre School Teacher Counselling	77,565		77,565	64,230	-13,335	2 vacant posts for part of the year + DBV funding. Reduction in supplies and services balances which will not be spent this year
90238	Early Years Inclusion Fund	108,000		108,000	108,000	0	
90054	Early Years adjustment re grant funding	297,450		297,450		-297,450	
	SSR	85,642		85,642	85,642	0	
	Early Years Block Total	27,240,317	139,345	27,379,662	27,025,842	-353,820	

Dedicated Schools Grant Monitoring Report 2025/26 – Quarter Three

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

Cost Centre	Description	Original Budget 2025/26	Net Virements in year	Amended Budget 2025/26	Actual	Variance	Comments
90026	Academy Schools RU Top Ups	1,297,350		1,297,350	1,250,000	-47,350	
90539	Special Schools - Top Up Funding	6,601,730		6,601,730	6,398,320	-203,410	
90548	Non WBC Special Schools - Top Up Funding	257,870		257,870	334,070	76,200	
90554	Non WBC free schools	504,750		504,750	877,250	372,500	
90556	SEMH provision at Theale	1,901,700		1,901,700	1,677,830	-223,870	
90557	Kennet Valley Resource Unit	655,840		655,840	655,840	0	
90575	Non LEA Special School (OofA)	1,456,230		1,456,230	1,540,130	83,900	
90579	Independent Special School Place & Top Up	11,425,820		11,425,820	11,695,000	269,180	
90580	Further Education Colleges Top Up	1,726,810		1,726,810	1,594,890	-131,920	
90617	Resourced Units top up Funding maintained	725,120		725,120	675,300	-49,820	
90618	Non WBC Resourced Units - Top Up Funding	43,720		43,720	60,953	17,233	
90621	Mainstream - Top Up Funding maintained	2,039,520		2,039,520	2,205,000	165,480	
90622	Mainstream - Top Up Funding Academies	1,199,630		1,199,630	1,150,000	-49,630	
90624	Non WBC Mainstream - Top Up Funding	124,980		124,980	160,160	35,180	
90625	Pupil Referral Units - Top Up Funding	1,196,370	90,000	1,286,370	1,254,085	-32,285	
90627	Disproportionate No: of HN Pupils NEW	200,000		200,000	230,000	30,000	
90628	EHCP PRU Placement	1,255,470		1,255,470	1,265,890	10,420	
	High Needs Block: Top Up Funding Total	32,612,910	90,000	32,702,910	33,024,718	321,808	
90320	Pupil Referral Units	860,000		860,000	860,000	0	
90540	Special Schools	3,410,000	-1,730,000	1,680,000	1,680,000	0	
90546	Special Schools - Place Funding Post 16	790,000	-450,000	340,000	340,000	0	
90551	Mainstream Maintained - post 16 SEN places	48,000		48,000	48,000	0	
90552	Special Schools and PRU Teachers Pay and Pension	334,600		334,600	334,600	0	
90584	Resourced Units - Place Funding	304,000		304,000	304,000	0	
	High Needs Block: Place Funding Total	5,746,600	-2,180,000	3,566,600	3,566,600	0	
90240	Applied Behaviour Analysis	0		0	0	0	
90573	Education Other Than At School (EOTAS)	279,470		279,470	424,520	145,050	
90574	Spot Purchases - Alternative Provision	376,090		376,090	609,000	232,910	
90280	Special Needs Support Team	395,110		395,110	336,670	-58,440	
90281	SEND Strategy (DSG)	75,140		75,140	71,630	-3,510	
90282	Medical Home Tuition	403,760		403,760	278,730	-125,030	
90237	High Needs Contingency	289,910	-90,000	199,910	199,910	0	
90286	Early Years Speech & Language	0		0	0	0	
90287	Pre School Teacher Counselling	151,355		151,355	125,330	-26,025	
90288	Elective Home Education Monitoring	72,360		72,360	56,310	-16,050	

Dedicated Schools Grant Monitoring Report 2025/26 – Quarter Three

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

Cost Centre	Description	Original Budget 2025/26	Net Virements in year	Amended Budget 2025/26	Actual	Variance	Comments
90290	Sensory Impairment	251,220		251,220	292,340	41,120	
90295	Therapy Services	614,680		614,680	614,680	0	
90372	Therapeutic Thinking	76,700		76,700	64,060	-12,640	
90373	Emotional Based School Avoiders (EBSA)	144,520		144,520	140,760	-3,760	
90374	SEMH Practitioner	54,240		54,240	37,000	-17,240	
90356	Fair Access Protocol	0		0	0	0	
90555	LAL funding	183,920		183,920	183,920	0	
90565	Equipment For SEN Pupils	20,000		20,000	15,000	-5,000	
90577	SEN Commissioned Provision	722,340		722,340	782,985	60,645	
90582	PRU Outreach	61,200		61,200	61,200	0	
90585	HN Outreach Special Schools	50,000		50,000	50,000	0	
90610	Hospital Tuition	36,180		36,180	6,800	-29,380	No children for majority of year, no further forecast
90830	ASD Teachers	326,130		326,130	318,010	-8,120	vacant post for part of year before restructure 1 July plus reduction of mileage balance which will not be spent in the current year
90961	Vulnerable Children	179,400		179,400	179,400	0	
90581	Dingleys Promise	125,000		125,000	125,000	0	
	High Needs Block: Non Top Up or Place Funding	4,888,725	-90,000	4,798,725	4,973,255	174,530	
90054	Efficiency Target	-14,039,870	-7,500	-14,047,370	0	14,047,370	
	SSR	172,921		172,921	172,921	0	
	High Needs Block Total	29,381,286	-2,187,500	27,193,786	41,737,494	14,543,708	
	TOTAL DSG EXPENDITURE	142,329,260	-1,958,125	140,371,135	154,552,169	14,181,034	
90030	DSG Grant Account	-142,329,260	1,958,125	-140,371,135	-140,371,135	0	
	Net In-year Deficit	0	0	0	14,181,034	14,181,034	
	Deficit Balance brought forward	16,132,638		16,132,638	16,132,638	0	
	In year reserve movement (Early years)				-392,030	-392,030	
	In year reserve movement (Schools)			0	56,854	56,854	Funding from reserves for de-delegations
	Cumulative Deficit	16,132,638	0	16,132,638	29,978,496	13,845,858	

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	tbc / Rebecca Page (supports procurement process only)	<u>October Update:</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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