

# Notice of Meeting

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## Schools Forum

**Monday 15 June 2026 at 5.00pm**  
Virtual Zoom Meeting

The meeting can be watched live here: [www.westberks.gov.uk/schoolsforumlive](http://www.westberks.gov.uk/schoolsforumlive)

Date of despatch of Agenda: Tuesday 9 June 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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Further information and Minutes are also available on the Council's website at [www.westberks.gov.uk](http://www.westberks.gov.uk)



## Agenda - Schools Forum to be held on Monday 15 June 2026 (continued)

**Forum Members:** Jay Armstrong, Kavash Bamfield, Reverend Mark Bennet, Catherine Bernie, Nicolle Browning, Heather Codling, Iain Cottingham, Jacquie Davies, David Fitter, Mel Godliman, Richard Hand, Michelle Harrison, Rebecca Hartley, Keith Harvey, Jon Hewitt, Jo Lagares, Steve Lewis, Julie Lewry, Brett Melvill-Smith, Jo MacArthur, Gary Norman, David Ramsden, Graham Spellman, Chloe Summerville, Edwin Towill and Charlotte Wilson

# Agenda

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**Agenda - Schools Forum to be held on Monday 15 June 2026** *(continued)*

- 14 **Date of the next meeting**  
*Monday 13<sup>th</sup> July 2026 at 5pm on Zoom.*

Sarah Clarke  
Executive Director - Resources

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



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## **SCHOOLS FORUM**

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

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

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

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

## **PART I**

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

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

### **2 Actions arising from previous meetings**

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

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

## SCHOOLS FORUM - 19 JANUARY 2026 - MINUTES

### 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

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

### 6 Work Programme 2026/27

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

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

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

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

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

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

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

### 8 Budgets for Additional Funds 2026/27

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

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

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

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

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

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

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

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

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

**10 Final DSG Funding Settlement Overview 2026/27**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### 11 **Final School Funding 2026/27**

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

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

### 12 **Growth Fund Applications 2025/26**

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

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

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

Emma Ferrey introduced the report (Agenda Item 14), which set out the current financial position of the high needs budget for 2025/26 and the position as far as it could be predicted for 2026/27, including the likely shortfall. Emma Ferrey explained that it provided an overview of the ongoing strategy to reduce pressure on the High Needs Block. She noted that whilst an overspend was still projected for 2026/27, the rate of increase had reduced significantly compared with previous years when in-year overspends had nearly doubled annually. Emma Ferrey attributed this improvement to the Delivering Better Value (DBV) programme and to strengthened central services. She outlined the range of work underway, including the creation of sufficient specialist places, increased early intervention and prevention, and greater support for mainstream settings. She confirmed, however, that the budget remained some distance from being brought into balance.

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

Rebecca Hartley further questioned the extent to which education services were covering needs that should sit within health. She expressed concern that schools were increasingly taking on responsibilities that had historically been funded by health services. Emma Ferrey agreed that this was an area requiring attention and confirmed she had raised it with the Executive Director. It was noted that some needs currently treated as educational might more appropriately fall under social care or health, and that

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the restructuring of Integrated Care Boards created uncertainty. Emma Ferrey added that health, including public health, should be held to account for its responsibilities, and she hoped upcoming national policy statements would reinforce shared accountability across agencies.

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

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

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

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

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

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

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

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

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

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

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

### 15 **Contracts Forward Plan**

The Schools' Forum noted the contracts forward plan.

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**16 Date of the next meeting**

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

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

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

**CHAIR** .....

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

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# Agenda Item 4

## Actions from previous meetings

Ref No.	Date of meeting(s) raised	Item	Action	Responsible Officer	Update
Jan26-Ac1	19th January 2026	Final DSG Funding Settlement Overview 2026/27	A report would be brought to the next round of meetings in June, which provided data on statutory timelines (EHCPs).	Emma Ferrey	This report is on the agenda for 15th June Schools' Forum meeting.

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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 13 MAY 2026**

**HFG Members Present:** Kavash Bamfield, Catherine Bernie, Nicolle Browning, Jacquie Davies, David Fitter, Michelle Harrison, Keith Harvey, Jon Hewitt, Jo Lagares, Jo MacArthur, Chris Prosser, Chloe Summerville and Edwin Towill

**Also Present:** Edith Cheng (Finance Manager), Emma Ferrey (Interim Service Manager of SEN), Kirstie Hanson (Head of Early Years), Ashley Milum (Service Director for Education and SEND), Joshua Ngeresa (Finance Manager), Hine Thompson (Senior Finance Business Partner), Tony Parker (Service Lead for Children's Commissioning), Ash Hussain (Senior Commissioner SEND and Joint Commissioning) and Jessica Bailiss (Democratic Services Officer)

**Apologies for inability to attend the meeting:** AnnMarie Dodds (Executive Director - People), Crystal Elkabbas (Principal Educational Psychologist & SEMH Service Manager), Julie Lewry, 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 SEND Commissioning and Efficiency Planning**

Tony Parker introduced the item, explaining that Children's Commissioning in West Berkshire was a newly established service, with Ash Hussain having recently been appointed as SEND Joint Commissioner. A presentation was provided which outlined the establishment of the Children's Commissioning Team, its role in Special Educational Needs and Disabilities (SEND) and wider Children's Services, current priorities, and future plans to strengthen joint working, improve value for money and develop local provision in line with national expectations.

The purpose of the presentation was also to seek feedback from schools on how the commissioning service could work more effectively with them. The HFG was invited to consider how feedback on commissioned services could be gathered and how schools could contribute to future commissioning decisions.

The HFG acknowledged the importance of the new commissioning function in improving quality assurance and ensuring services met the needs of children and young people. It was noted that the development of the service was at an early stage and would continue to be brought back to the HFG for further discussion.

**RESOLVED** that the update on commissioning arrangements was noted.

##### **3 EHCP Timeliness**

Emma Ferrey introduced the report, which outlined the current position in relation to EHCP timeliness. The HFG noted that the key performance indicator around timeliness for completing EHCPs had significantly reduced between 2024 and 2025, driven by increasing demand and capacity pressures within the SEN Assessment Team, which had

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not expanded in line with rising demand. It was reported that demand had continued to increase following the publication of the Government's White Paper in February 2026 and that this was a situation that required ongoing monitoring. It was noted that there had been a significant increase in assessment requests from parents.

Following discussion at the previous meeting and subsequent analysis, it was considered that reduced timeliness was attributable to a combination of factors which were set out in section 4.6 onwards of the report.

The HFG discussed the specific factors contributing to demand and system pressures. It was noted that further work was planned to support schools and strengthen a system wide approach to inclusion.

It was noted that some queries raised by members, including in relation to the use of HIVE Educational Psychologist reports in assessment reports and consultation processes with schools for EHCP placements, would be taken forward for further review.

The HFG noted that information on the average length of time to complete an EHCP request would be provided following this meeting.

### **RESOLVED that:**

- The report was noted.
- Information on average EHCP processing times would be provided following the meeting. (*post-minute note: this information is included in the EHCP Timeliness Report for the Forum on 15 June.*)

## **4 School Balances 2025/26**

Edith Cheng introduced the report, which outlined the position of maintained school balances at the end of the 2025/26 financial year. The HFG noted that overall balances had reduced compared to the previous year, reflecting ongoing financial pressures across schools, particularly within the primary sector.

It was reported that the reduction in balances was driven by a combination of falling pupil numbers, sustained staffing costs and increasing SEND pressures. The HFG noted that while overall balances were declining, a small number of schools continued to hold surplus balances above the agreed threshold and would be required to submit balance statements for further review.

The HFG discussed the financial pressures facing schools, particularly in relation to the sustainability of smaller schools, and noted this as a key area of focus going forward.

**RESOLVED that** the report was noted.

## **5 Scheme for Financing Schools Consultation 2026/27**

Edith Cheng introduced the report, which provided information on the updated Scheme for Financing Schools (SFS) and recommended that it should go out for consultation with schools from 15<sup>th</sup> until 25<sup>th</sup> June 2026.

The HFG noted that the scheme set out the financial relationship between the Local Authority and maintained schools. It was reported that no major changes had been suggested by the Department for Education and that the updates proposed related to local practice, including additional clarity around financial monitoring and deficit recovery arrangements. The HFG noted that the proposals would be subject to consultation with maintained schools ahead of final approval by Schools' Forum in July.

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**RESOLVED** that the HFG supported the recommendation set out in the report, which would go forward to the Schools' Forum on 15<sup>th</sup> June for consideration and decision.

### 6 **Surplus Balances and School Balance Statements**

Edith Cheng introduced the report, which outlined the position regarding surplus balances held by schools and the process for reviewing balances above the agreed threshold. It was noted that the report would go to the Schools' Forum in July for decision.

Five schools had been identified as having a balance greater than 10 percent of their budget share and would be asked to provide a statement explaining how the balance was committed.

The HFG sought clarification on the process for reviewing surplus balances, noting that it had been contentious in the past. It was clarified that the agreed approach was for Officers to review the balance statements and present a report to the Schools' Forum, enabling a decision to be made on whether to claw back or not. Edith Cheng confirmed that a report could be prepared in line with this approach and shared with the HFG for comment in advance of the Schools' Forum meeting.

**RESOLVED** that a report setting out recommendations on surplus balances to be circulated to the HFG for comment in advance of it going forward to the Schools' Forum in July.

### 7 **Deficit Schools**

Edith Cheng introduced the report, which outlined the position regarding schools in deficit. The HFG noted that both the number of schools in deficit and the overall level of deficit had increased compared to the previous financial year.

It was reported that a number of schools had set planned deficit budgets, with a small number also ending the year in unplanned deficit. The main drivers of deficits were noted as falling pupil numbers, rising staffing costs and increasing SEND pressures.

The HFG discussed the position of schools in long-term deficit, noting that some schools had been in deficit for a number of years and that there was a need for a consistent approach to supporting schools alongside appropriate challenge. It was noted that further work was underway to strengthen this approach and provide greater clarity for schools.

**RESOLVED** that the report was noted.

### 8 **Any Other Business**

The HFG noted an update regarding training for Schools' Forum members. It was reported that an induction-style approach was being considered, to allow time to identify key areas for development. The induction training would be offered to new members and could also be shared with existing members to support their understanding. Feedback on the proposed approach was welcomed. It was noted that further work would be undertaken to develop this approach.

### 9 **Date of the next Heads Funding Group meeting**

The next meeting would take place at 3.30pm on Tuesday 22<sup>nd</sup> September 2026.

*(The meeting commenced at 3.30pm and closed at 4.45pm)*

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## EHCP Timeliness

Report being considered by: Schools' Forum / HFG  
 Date of Meeting: 15 June 2026  
 Report Author: Emma Ferrey  
 Item for: Discussion      **By:** All Forum Members

### 1. Purpose of the Report

1.1 This report sets out the current position on timeliness of finalising EHCPs and measures in place to improve.

### 2. Recommendation

2.1 Report is for information and discussion.

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 The KPI for EHCP timeliness has reduced from 47% in 2024 to 22% in 2025.
- 3.2 The SEN Assessment Team are over capacity and have been for some time. There has been no increase in the size of the team, despite the trebling of demand.
- 3.3 The demand for EHCPs, in terms of numbers, is significantly increasing, likely due to concerns from parent carers, and schools, regarding the implementation of the SEND White Paper Reforms over the coming years.

### 4. Introduction and background

- 4.1 The Statutory timescale is 6 weeks from request for an EHCP made by parent, young person, school or other agency to the LA deciding whether to carry out an Education, Health and Care Needs Assessment (EHCNA).
- 4.2 The Statutory timescale is 16 weeks from request made by parent, young person, school or other agency at which point the LA should issue a draft EHCP. The intent of the SEN Code of Practice (2015) is that the Draft EHCP is issued at week 16, enabling the parents to make representations, identify their preferred school for the local authority to consult with, as well as consulting with its own preference

## EHCP Timeliness

- 4.3 The statutory timescale to issue a Final EHCP is at week 20. The Final EHCP should contain an educational provision, and its type, named in Section I (placement). At this time, parents are given their right to appeal the content of EHCP, namely B (SEN Needs), F (Provision) and I (placement). Parents can raise an extended appeal to include Health (G) and Social Care (H) provision.
- 4.4 Over the past 4 years, EHCP timeliness has decreased, both in numbers of Plans and as a percentage. Table 1 below shows the number of Plans completed within the 20-week timescale, this number as a percentage and the total number of EHCP assessments.

**Table 1**

<b>Year</b>	<b>All EHCP assessments</b>	<b>No. completed within 20 weeks</b>	<b>% completed within 20 weeks</b>
2020	83	60	72%
2021	157	98	62%
2022	190	114	60%
2023	281	177	63%
2024	266	125	47%
2025	259	58	22%
2026 (to April)	101	2	2%

- 4.5 To note: from 2020 to 2024, the number of Plans issued within the deadline had doubled, but the overall percentage had increased due to the escalation of requests for EHCP. 2025 data shows approximately the same number of Plans issued within deadline but a significantly reduced percentage as a whole.
- 4.6 The reduction in timeliness in 2025 and 2026 is due to a number of factors:
- (1) Capacity of the SEN Assessment Team
  - (2) Awaiting EP assessment report
  - (3) Parents challenging the content of the EHCP, particularly when they have commissioned private specialists
  - (4) Schools responding to consults with 'cannot meet need' which leads to further consultations required

## **EHCP Timeliness**

- (5) Schools challenging banding/ funding agreements in Plans and requesting increased funding
- 4.7 As at March 2026, there were 122 statutory assessments in progress awaiting information and evidence, of which, 45 were over 16 weeks. Of these 122, 34 were awaiting EP assessments and 13 of these were over 16 weeks.
- 4.8 Demand for EHCP assessments is being driven by parents. Almost 40% of requests for EHCP assessments now come from parents (compared to 14% in 2020 and 21% in 2023).
- 4.9 A decision was made in June 2024, to reduce the threshold for EHC assessments. This was due to the number of appeals to Tribunal because of 'Refuse to Assess'. This has had a significant impact on the number of assessments processed.
- 4.10 HFG requested that average time to EHCP issue was included in this report. For calendar year 2025, average time was 25.7 weeks. For YTD (i.e. June 2025-May 2026) average time was 29.2 weeks.
- 4.11 The publication, in February, of the White Paper SEND Reforms has caused concerns amongst both parent carers and school staff around what the new threshold will be for EHCPs (although this will not be included in the revised Code of Practice until around 2029 or later, it is not yet clear).
  - (1) From February 2026 to March 2026 we have seen a 68% increase in EHC needs Assessments requests; from 31 to 52 respectively.
  - (2) For the same period in 2025 there was a 21% increase (from 33 to 40).

## **5. Conclusion**

- 5.1 The SEN Assessment Team is a small team that has, up until last year, managed to keep up with increasing demand. However, there are not enough EHC Coordinators to draft and finalise the Plans. The Team has also been significantly impacted due to delays in receiving EP and other professional assessments.
- 5.2 The service also recognise the demand on schools, which can lead to an increase in rejections of consults, which in turn adds further delay.

## **6. Appendices**

- 6.1 None.

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## Trade Union Annual Report 2026

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**Report being considered by:** Schools' Forum

**Date of Meeting:** 15 June 2026

**Report Author:**

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

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### 1. Purpose of the Report

1.1 To outline the work of the Teaching Trade Unions to Schools' Forum.

### 2. Recommendation

2.1 That Schools' Forum note the report.

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

### 3. Introduction and Background

As of 18.5.26, the STPRB's recommendations have not been released. This in spite of a promise by the education secretary to publish by the end of April so that schools can sort their budgets out promptly without the endless delays and last day of term arrival of decisions in previous years. A leak in The Times last week<sup>1</sup> suggests that, whilst this year's potential offer of 3.5% may be in line with the current rate of inflation, the anticipated rises by the autumn term will wipe this out. It is also expected that this would mean that only another 3% pay increase would accrue over the following 2 years as part of the recommended 6.5% 3 year deal that the DfE proposed to the STRB. However, the fundamental problem is that it looks like the deal will be unfunded. This represents another real terms cut in overall funding for schools. The IFS annual report on school funding states the following: "Public spending on education has also fallen as a share of national income, from about 5.6% of national income in 2010–11 down to about 4.1% in 2024–25. This equals the historic lows seen in the late 1990s, late 1980s and mid 1960s. There has been no long-run increase in the share of national income devoted to public spending on education, despite rises in post-compulsory education participation over the long run."<sup>2</sup> Add to this the SEN funding crisis and the increased expectations of the White

<sup>1</sup> [Teacher pay deal set to fall well below inflation. Expect more strikes](#)

<sup>2</sup> [Annual report on education spending in England: 2025–26 | Institute for Fiscal Studies](#)

Paper with its 400 million (expected to not touch the sides), then education is in as parlous a state as it has been for many years.

Unless the fundamental model of how governments choose to see funding for public services as an investment, rather than as spending which has to be balanced against self imposed fiscal rules and the tyranny of the bond and banking sectors, then it is difficult to see anything other than further managed decline being the norm.

NEU are moving to ballot for strike action in the Autumn.<sup>3</sup> This will include Support members and support staff in GMB, Unite and Unison may also be balloted. It is believed that this will also be the case with the NASUWT and NAHT. Supportive noises have been made by ASCL without any direct call for action as yet. This notwithstanding, it is expected that school leaders will be more supportive of strike action by staff in these unions than last time and this could prove pivotal in any industrial dispute.

There is some good news from the NFER annual report on the Education Workforce<sup>4</sup> which indicates there has been an increase in staffing, but a fall in support staff. Workload measures are having some impact, including the flexible working changes, but these still often compare unfavourably to other countries of similar size and GDP.

### 3.1 Casework

Facility time enables trained and elected local officers to support schools and members in a variety of ways. The NEU has the highest density of membership across the LA. Some head teachers are members of the NEU, but most belong to NAHT or ASCL. Membership amongst NASUWT has fallen. Support staff can be members of the NEU, but they have no collective bargaining rights unlike those members in Unison, Unite or GMB. Support staff union membership is, however, relatively low.

Where a school does not contribute to facility time, certain restrictions in the ability to cover those workplaces apply. There are only reps in less than a third of schools. Heads are encouraged to seek to establish a rep and their workplace, but members are mostly reluctant to do so owing to perceived workload or fear that they will be viewed negatively by management. This does mean that the facility pot is important to maintain as much support as possible given most workplaces are lacking in reps or, where they do exist, reps who are fully trained.

Please see appendices Letter to Heads of schools who do not contribute to facilities.

### 3.2 III Health and Absence Management

We continue to see high levels of absence related to workload and stress. The TES Wellbeing Report 2026<sup>5</sup> relates to this and also offers useful insight into alleviating some of the issues which lead to staff absence. The key drivers of stress are workload and pupil behaviour. Issues around pupil violence have also increased both locally and nationally.

Useful guidance from HSE exists around what staff should expect from workplaces to protect them against violence at work.<sup>6</sup>

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<sup>3</sup> [NEU to launch a formal ballot for strike action | National Education Union](#)

<sup>4</sup> [The Education Workforce in England: Summary Report 2026 - NFER](#)

<sup>5</sup> [Tes Wellbeing Report 2026 | Tes](#)

<sup>6</sup> [violence-at-work-a-guide-for-employers.pdf](#)

Since COVID, many workplaces have begun using HEPA filters. There is strong and accumulating evidence that absence rates amongst both staff and students in schools where these filters have been installed are falling. This has obvious advantages for both costs and learning.

Tools for Healthy Schools<sup>7</sup> has a useful calculator which schools can use to estimate the potential benefits of installing HEPA filters.

SAMHE (Schools Air Quality Monitoring for Health and Education) also provides some compelling evidence. In London, the Schools Filters Programme<sup>8</sup> is combatting pollution by installing filters and countering the potential learning damage done by fumes in urban or industrial areas.

Hertfordshire LA has installed HEPA filters across all 63 of its primaries<sup>9</sup> in collaboration with SAMHE<sup>10</sup>

Unions would urge both the authority and schools to consider a cost benefit analysis of rolling out a similar programme.

### **3.3 Malicious and Vexatious Complaints**

Sadly, these continue to be a major bugbear for both staff members and leaders who have to deal with them. In collaboration with the LA, the NAHT and the NEU have set up a working party of school leaders to try and address how complaints of this nature can be addressed and mitigated. Such complaints often lead to prolonged, stressful investigations which cause absence and occasionally resignation. They take up an inordinate amount of time which could be better spent focussing on what children need in the classroom and are a major distraction from this primary purpose.

### **3.4 Capability and Appraisal**

Unions emphasise again that appraisal policies should have a clear interim review under the no alarms no surprises approach so that performance management flags the need for capability at the earliest possible stage. Pay rises should be automatic unless a member of staff is on capability as agreed in the STPCD. It is also important that any informal capability interventions are not conflated with appraisal.

### **3.5 Disciplinary**

The number of disciplinaries has increased. We are seeing more cases of younger teachers often making poor judgement calls in classroom management which results in parental complaint. In a profession where a 2018 TALIS<sup>11</sup> survey revealed that teachers in England were the youngest in Europe averaging 38 years old in comparison to the European average of 44 (and this is probably much lower in England now given it is 8 years out of date), it is perhaps not surprising that errors emerge as a result of lack of experience. A February 2026 report by QE Insights<sup>12</sup> also offers some revealing data on

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<sup>7</sup> [coschools.org.uk/CHEPAcalculator](https://coschools.org.uk/CHEPAcalculator)

<sup>8</sup> [School Filters Programme | London City Hall](#)

<sup>9</sup> [What we're doing across Hertfordshire](#)

<sup>10</sup> [SAMHE+HSVP | SEI](#)

<sup>11</sup> [TALIS 2018 research](#)

<sup>12</sup> [How does teaching in England compare internationally?](#)

the workforce demographic in England compared to international settings: “27.6% of primary school teachers and 19% of secondary teachers in the UK are under 30 – the [highest proportion](#) of young teachers in the OECD. The OECD average for under-30s is 12.7% of primary and 9.2% of secondary teachers.”

### **3.6 Contracts, Pay and Conditions**

Fixed terms contracts still occasionally emerge as an issue. Some are connected to the employment of overseas staff and sponsorship of visas. Unions discourage fixed term contracts unless there is a compelling reason to use them. The STPCD made it clear that by September 2026, all TLRs should be paid in their entirety to the member of staff to whom they are awarded if they have full responsibility for that subject area. The pro rata principle for part time staff should not exist beyond this point. Some schools have already adopted this early and the union makes it clear to its members that such workplaces are to be credited as good employers.

The unions<sup>13</sup> flag the benefits of flexible working and how the STPCD has attempted to emphasise this recently. ACAS also has some useful guidance.<sup>14</sup> Whilst the nature of teaching means that working from home options are not as straight forward, especially in secondaries, as other professions, the issue is ignored at our peril in terms of recruitment and retention. Most local workplaces have at last opted to allow much greater flexibility around using PPA as work from home option, and this is to be welcomed. If it isn't offered, it makes one school a far less attractive prospect when compared to one that does and, as ever, the union reminds its members to be mindful of this.

### **3.7 Grievances**

There has been no notable increase in the number of grievances in the last year. Union intervention means that they continue to be managed via advice before escalation. When they do become formal, they are often time consuming and divisive. They are certainly not to be encouraged but sometimes do become the only remaining option for staff and the union does have a duty to support members if they choose it.

### **3.8 Settlements**

There have been a few settlement agreements this year. They are often time consuming and expensive but occur when relations between employer and employee break down beyond repair and often offer the best solution for all parties to move on.

### **3.9 Governance**

Having good governors in place is vital and the union enthusiastically recommends that as much training as possible is offered. Conversely, poor governance can create more problems than it solves and can make processes protracted, especially in relation to breaches of policy and employment law if governors do not know the details, or indeed, understand them.

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<sup>13</sup> [Flexible working | National Education Union](#)

<sup>14</sup> [Code of Practice on requests for flexible working | Acas](#)

### 3.10 Collective Issues

Around this time of year the issue of gained time emerges. What staff can be asked to do used to be clearer, but it remains nebulous and we urge members to accept what is reasonable. Gained time should work in tandem with rarely cover and making staff aware of what is going on and what is deemed reasonable can avoid this becoming a divisive issue.

Mandatory training being done in staff's own time can also be an issue and we advise our members that it should only be undertaken as part of directed time.

### 3.11 LA Polices and Guidance and Negotiating Forum

Rationalising the approach to dealing with policies that need reviewing was always discussed at ECM. Key policy documents are prioritised and unions meet separately in order to give them proper scrutiny.

The unions also welcome the fact that a new negotiating forum has been established JNCC (Joint Negotiating and Consultation Committee) which replaces ECM. It has a clearer and stronger remit and the unions are very grateful in particular to Olimpia Byrne from HR for all her hard work in making this happen.

## 4. Conclusion

Schools that continue to contribute to facility time demonstrate that they value their workforce and the support that the teaching unions offer. With a lack of workplace reps, support from experienced caseworkers is crucial. A school which supports and recognises the constructive role that unions play makes itself a far more appealing prospect as an employer and we would argue gives those schools a competitive edge in a demanding recruitment market place and is also a strong influence over staff retention which is arguably just as important.

## 5. Appendices

### 5.1 Appendix A – Letter to Heads of schools who do not contribute to school facilities:

*Dear Headteacher*

*We are experiencing a significant increase in members contacting us for help and advice, along with requests for support at meetings.*

*You may not be aware that NEU branches do not have paid case workers to do this job.*

*Instead, schools contribute to a pooled resource pot which is used to release teachers who are elected officers of the branch – West Berkshire in your case. It is called facility time.*

*All local authority schools contribute to this.*

*Unfortunately, some schools in West Berkshire do not have work place reps. This is where local officers can help.*

*Employers have a statutory obligation under the Employment Relations Act 1999 to enable their employees to be properly supported in the workplace.*

*Contributing to the facility time pot has many advantages:*

- Effective workplace mechanisms which help perceptions of fairness and countering discrimination*
- Union representatives who have experience in representing members and have been trained to do so*

- *Co-operation when dealing with the exponential growth over recent years in legislation and guidance covering schools*
- *Trade union facility time is usually far less than comparable management time and subsequent costs e.g. HR, consultants, lawyers*
- *Hidden costs to morale in terms of excluding or limiting trade union voice*
- *The positive contribution that is made by involving educators via their trade union. This was clearly demonstrated and more widely appreciated during the pandemic*
- *The increasingly complex issues that students face that educators are expected to deal with*
- *Recognizing the commitment that the new government made in their manifesto page (p16) to 'ensure there is sufficient facilities time for all trade union reps so that they have capacity to represent and defend workers, negotiate with employers and train'.*

*Even if a school has a rep, there are often occasions when they do not have the time, expertise or experience to deal with some cases or may be uncomfortable supporting colleagues in confidential matters.*

*We would ask that, at the very least, you encourage a member of your staff who is in the NEU to stand as a rep if you don't have one and give them some protected time to discharge their responsibilities*

*Ideally, we ask that you contribute to the facilities time pot so that you have timely access to the support of branch officers. The amount paid is calculated based on the number of pupils at the school. You can contribute even if your school does not have a trade union recognition agreement. We would, however, urge you to adopt one.*

*We support all of our members at all schools, but we are unable to offer timely support at meetings to schools who do not contribute to the facility pot any longer given increase in workload. This will mean that we will need to request a postponement for meeting requests of at least 5 working days, offering alternative dates when a paid Regional Officer is available. The delay may be longer if the request cannot be reasonably accommodated. Delays create further stress for all involved.*

*If you would like to contribute to the facility pot you can do so by arranging this with West Berkshire LA and contacting [hxforschools@westberks.gov.uk](mailto:hxforschools@westberks.gov.uk)*

*Should you wish to discuss this proposal in more detail, please contact Richard Hand and/or Keith Watts at the e mail addresses below.*

*[Richard.hand@neu.org.uk](mailto:Richard.hand@neu.org.uk)*

*[Keith.Watts@neu.org.uk](mailto:Keith.Watts@neu.org.uk)*

*Yours sincerely*

*Richard Hand*

*Keith Watts*

*Joint District and Branch Secretaries, West Berkshire NEU*

**Please also see footnotes**

## School Balances 2025/26

**Report being considered by:** Schools' Forum

**Date of Meeting:** 15 June 2026

**Report Author:** Kirsty Bray

**Item for:** Discussion/Comment      **By:** All Maintained Schools Representatives

### 1. Purpose of the Report

1.1 This report sets out for information purposes the year end balances for all maintained schools, highlighting those schools with a deficit or significant surplus.

### 2. Recommendation

2.1 To discuss the report and consider if further information is required on surplus balances.

**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. Introduction and Background

3.1 This report provides an overview of school balances at the end of 2025/26. The Scheme for Financing Schools 2025 (issue 16) para 7.2 states:

In order to control surplus balances, the authority will report the balances held by each school at the end of the financial year to the schools' forum (during the summer term), alongside the actual and planned balance for the previous three years and any other data deemed to be of relevance.

Individual schools with excessive balances should provide further information on a School Balance Statement, to be reviewed by the Heads Funding Group to ensure information surrounding commitments is justified and reasonable. Any uncommitted balance and anything in the statement that it is deemed should be covered by future budgets rather than balances, could be subject to clawback.

The maximum that could be clawed back each year is the amount of school balance in excess of 10% of their budget share, subject to leaving the schools with a minimum balance of £50,000, The actual amount of clawback will be recommended by the Heads Funding Group to the Schools Forum.

3.2 The calculations will be made on balances as at 31 March 2026.

#### 4. Overview of School Balances as at 31 March 2026

4.1 Table 1 summarises the overall closing balances (all funds) of West Berkshire maintained schools compared to the previous year.

TABLE 1	As at 31	As at 31	Increase/(Decrease)	
	March 2025	March 2026	£'000	%
<b>Total Balances Summary</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>%</b>
Nursery Schools	280	372	92	32.8%
Primary Schools	3,532	2,810	(721)	(20.4%)
Secondary Schools	2,822	2,923	102	3.6%
Special Schools	842	1,261	419	49.8%
Pupil Referral Units	563	270	(293)	(52.1%)
<b>Total for all Schools</b>	<b>8,039</b>	<b>7,637</b>	<b>(402)</b>	<b>(5.0%)</b>

Split of Balances	As at 31	As at 31	Increase/(Decrease)	
	March 2025	March 2026	£'000	%
<b>Split of Balances</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>%</b>
Surplus	8,895	9,086	192	2.2%
Deficit	(856)	(1,450)	(594)	69.3%
<b>Total for all Schools</b>	<b>8,039</b>	<b>7,637</b>	<b>(402)</b>	<b>(5.0%)</b>

4.2 The school balances (revenue and capital) as at 31 March 2025 total £7.6m, a decrease of £0.4m from 2024/25. Primary schools and PRU's have seen a decrease, whilst nursery, secondary and special schools have all seen increased YE balances.

4.3 Table 2 summarises the balances of West Berkshire maintained schools by fund.

TABLE 2	Main School Budget	Pupil Premium	Revenue			Revenue Total	Community (Before & After school clubs)	Capital	Total Balances
			Sports Fund	Resource Units					
2025/26 Balances by type of fund	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	
Nursery Schools	365	0	0	0	365	0	7	372	
Primary Schools	986	180	72	163	1,401	610	800	2,810	
Secondary Schools	2,526	0	0	0	2,526	0	398	2,923	
Special Schools	1,215	17	0	0	1,232	0	29	1,261	
Pupil Referral Units	223	0	4	0	228	0	42	270	
<b>Total for all Schools</b>	<b>5,314</b>	<b>198</b>	<b>77</b>	<b>163</b>	<b>5,752</b>	<b>610</b>	<b>1,276</b>	<b>7,637</b>	
2024/25 Balance	5,865	170	191	141	6,367	555	1,116	8,039	
Increase/(Decrease)	(551)	28	(115)	22	(616)	55	159	(402)	
%	(9.4%)	16.2%	(60.0%)	(15.6%)	(9.7%)	9.8%	14.3%	(5.0%)	

4.4 In addition to the £5.75m being held in revenue balances, £610k is held in extended day funds and £1.27m in capital balances.

- (1) Of the revenue balances, £198k is unspent pupil premium grant (though note that not all schools account for this separately and include within the main school budget), and £77k is unspent sports premium grant. All unspent sports funding must be spent by the end of this academic year (July 2026).

- (2) The £610k balance in the before and after school clubs is an increase on 2024/25 and builds upon the increase in the previous year.

4.5 Table 3 summaries the main school balances:

<b>TABLE 3</b>	<b>As at 31</b>	<b>As at 31</b>	<b>Inc/(Dec)</b>	<b>Balance as a</b>
<b>Main School Balances</b>	<b>March 2025</b>	<b>March 2026</b>		<b>% of funding</b>
	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	
Nursery Schools	278	365	87	22%
Primary Schools	1,989	986	(1,003)	1%
Secondary Schools	2,299	2,526	226	9%
Special Schools	777	1,215	438	23%
Pupil Referral Units	522	223	(299)	6%
<b>Total for all Schools</b>	<b>5,865</b>	<b>5,314</b>	<b>(551)</b>	<b>5%</b>

- (1) Primary school balances have decreased for a third year in a row. The balance of £986k represents 1% of the main school funding. 26 primary schools have seen an increase in balances (£737k), and 25 a decrease (£1740k). A detailed breakdown per school is shown in Appendix A.
- (2) One of the maintained secondary schools has a decreased balance in 2025/26 of £47k. Two of the maintained secondary schools have seen an increase in their balance (£273k). Appendix B provides details of these.
- (3) The maintained special schools main school balance has increased by £438k. Please see Appendix B for the breakdown.
- (4) The nursery school balances have increased by £87k as shown in Appendix B.

## 5. Schools with Significant Surpluses

- 5.1 The Schools' Forum agreed to reintroduce the claw back scheme for schools with excess surplus balances as at 31 March 2026. Information on high surplus balances is to be reported for 2025/26. Table 4 shows those schools with a main school surplus balance greater than 10% of their funding in 2025/26.
- 5.2 All of the schools in the table above, with the exception of The Castle, also held a balance greater than 10% as at 31 March 2025.

<b>TABLE 4 Main School Surplus Balances</b>	<b>As at 31 March 2025</b>	<b>As at 31 March 2026</b>	<b>School Budget Share 2025/26</b>	<b>Percentage of Funding %</b>	<b>Balance in excess of 10%</b>
<u>Nursery</u>					
Hungerford Nursery School	116,824	164,574	927,316	18%	-71,842
Victoria Park Nursery	160,976	200,345	942,238	21%	-106,121
<u>Primary</u>					
Beedon Primary	76,597	79,302	374,187	21%	-29,302
Beenham Primary	55,902	60,094	512,876	12%	-8,806
<u>Special</u>					
Castle	522,347	848,373	6,098,472	14%	-238,526
<b>Total for all Schools</b>					<b>-454,596</b>

5.3 The above significant surpluses will be subject to clawback upon decision of Schools Forum.

## 6. Conclusion

6.1 School reserves had been increasing overall year on year since 2017/18, when the reserves were £3.7m.

6.2 Primary school main school balances have decreased for a third year in a row. The balance represents 1% of the main school funding. Given the continued combination of reduced pupil numbers, a reported growing number of children presenting with additional needs who are creating increasing budgetary pressure in schools and the removal of additional funding to support education recovery, the primary school balances are forecast to continue to reduce in the coming year.

6.3 Schools with surplus balances have been contacted in relation to the clawback of surplus funds.

## 7. Appendices

7.1 Appendix A – Main School Budget Balances Maintained Primary Schools

7.2 Appendix B – Main School Budget Balances Maintained Other Schools

## School Balances 2025/26

### Appendix A

	Main School Budget Balance					Inc/Dec
	2021/22	2022/23	2023/24	2024/25	2025/26	
	£	£	£	£	£	£
<b>Primary Schools</b>						
Aldermaston Church of England Primary School	94,133	76,480	2,263	(47,526)	36,180	83,706
Basildon Church of England Primary School	(23,004)	(9,986)	29,151	43,242	76,265	33,023
Beedon Church of England (Controlled) Primary School	49,431	67,618	65,718	76,597	79,302	2,705
Beenham Primary School	20,936	(31,015)	(9,894)	55,902	60,094	4,191
Birch Copse Primary School	26,569	60,025	18,642	12,764	45,681	32,918
Bradfield Church of England Primary School	12,596	15,476	9,246	25,397	1,854	(23,543)
Brightwalton Church of England Aided Primary School	42,967	35,015	48,594	34,758	(24,731)	(59,489)
Brimpton Church of England Primary School	11,308	(30,834)	(14,162)	(24,864)	(4,662)	20,202
Bucklebury Church of England Primary School	2,712	(18,734)	21,238	(3,790)	(31,144)	(27,354)
Burghfield St Mary's Church of England Primary School	43,292	46,588	77,028	59,912	77,781	17,868
Calcot Schools Federation	220,266	198,116	175,182	97,697	22,716	(74,981)
Chaddleworth Shefford Federation Cof E Primary School	80,762	87,012	86,479	69,297	70,580	1,284
Chieveley Primary School	59,104	75,856	90,251	52,760	(64,877)	(117,637)
Cold Ash St Mark's Church of England Primary School	17,698	879	6,137	10,837	14,026	3,189
Compton Church of England Primary School	68,759	99,784	89,873	270,709	96,208	(174,501)
Curridge Primary School	82,835	53,622	75,025	20,193	24,663	4,470
Downsway Primary School	26,948	31,417	52,020	76,987	94,236	17,249
Enborne Church of England Primary School	3,574	0	(32,598)	(14,048)	5,205	19,253
Englefield Church of England Primary School	70,244	60,450	42,075	14,279	24,881	10,602
Falkland Primary School	329,663	188,834	105,890	86,137	127,408	41,271
Garland Junior School					0	0
Hampstead Norreys & The Ilsleys	12,493	68,065	95,029	112,005	48,825	(63,180)
Hermitage Primary School	(7,151)	1,911	(13,311)	(40,499)	(190,567)	(150,069)
Hungerford Primary School	106,570	111,060	159,448	155,356	148,376	(6,981)
Inkpen Primary School	(17,964)	5,782	36,075	62,366	36,823	(25,542)
John Rankin Schools Federation	445,104	414,775	503,665	362,211	223,118	(139,093)
Kennet Valley Primary School	82,901	50,592	3,875	1,800	(30,519)	(32,319)
Kintbury St Mary's Church of England Primary School	18,523	56,700	59,209	71,433	98,504	27,071
Long Lane Primary School	10,279	(76,173)	(29,745)	31,672	84,634	52,961
Mortimer Federation	49,510	63,658	82,899	56,620	39,248	(17,372)
Mrs Bland's Infant School					0	0
Pangbourne Primary School	3,804	520	(77,778)	(88,050)	(111,155)	(23,104)
The Burghfield Common Federation	133,145	189,310	183,632	13,171	(134,301)	(147,472)
Parsons Down Schools Federation	101,146	218,432	288,513	196,812	95,194	(101,618)
Purley Church of England Infant School	64,326	74,704	45,390	14,829	(24,456)	(39,284)
Robert Sandilands Primary School and Nursery	170,993	146,824	127,157	127,038	127,939	900
Shaw-cum-Donnington Church of England Primary School	4,973	16,737	8,253	12,582	19,691	7,109
Springfield Primary School	274,906	352,615	400,089	259,723	145,664	(114,060)
Spurcroft Primary School	(79,302)	(138,281)	(199,639)	(154,340)	(130,215)	24,125
St Finian's Catholic Primary School	0	(33,935)	(87,161)	(75,444)	(62,952)	12,493
St John & St Nics Federation	74,283	11,214	(47,172)	58,895	122,919	64,023
St Joseph's Catholic Primary School	(7,173)	(85,585)	(158,621)	(182,853)	(175,149)	7,704
St Paul's Catholic Primary School	228,677	196,548	104,347	14,776	190	(14,586)
Streatley Church of England Voluntary Controlled School	13,960	19,451	29,266	52,757	51,123	(1,635)
Sulhamstead and Ufton Nervet CofE VA Primary School	16,993	28,714	45,908	52,159	68,706	16,547
Thatcham Park Church of England Primary School	150,148	111,216	111,581	95,106	19,793	(75,313)
The Kite Federation	(37,097)	73,182	58,193	(91,131)	(260,929)	(169,798)
The Willows Primary School	232,354	129,060	47,375	33,387	101,700	68,313
The Wincombe School	21,573	31,821	57,886	60,543	5,477	(55,066)
Theale Church of England Primary School	37,384	8,626	(39,994)	(234,747)	(101,947)	132,800
Westwood Farm Schools Federation	44,253	77,699	47,080	100,749	24,120	(76,630)
Woolhampton Church of England Primary School	23,094	39,782	(133)	(38,500)	(7,275)	31,225
Yattendon Church of England Primary School	22,423	14,086	22,545	31,247	21,695	(9,552)
<b>Total Primary Schools</b>	<b>3,435,921</b>	<b>3,185,714</b>	<b>2,802,018</b>	<b>1,988,913</b>	<b>985,937</b>	<b>(1,002,976)</b>

## School Balances 2025/26

### Appendix B

	Main School Budget Balance					Inc/Dec
	2021/22	2022/23	2023/24	2024/25	2025/26	
	£	£	£	£	£	£
<b>Nursery Schools</b>						
Hungerford Nursery School	42,439	12,082	8,319	116,824	164,574	47,750
Victoria Park Nursery School	98,679	72,277	149,760	160,976	200,345	39,368
<b>Total Nursery Schools</b>	<b>141,119</b>	<b>84,359</b>	<b>158,079</b>	<b>277,800</b>	<b>364,918</b>	<b>87,118</b>
<b>Secondary Schools</b>						
The Downs School	662,609	1,211,610	1,467,308	889,694	842,818	(46,876)
Little Heath School	607,454	603,436	716,598	851,603	1,075,064	223,461
The Willink School	707,494	678,716	816,683	557,859	607,670	49,810
<b>Total Secondary Schools</b>	<b>1,977,557</b>	<b>2,493,762</b>	<b>3,000,590</b>	<b>2,299,156</b>	<b>2,525,552</b>	<b>226,396</b>
<b>Special Schools</b>						
The Castle School	749,418	1,147,535	847,633	776,823	848,373	71,549
<b>Total Special Schools</b>	<b>749,418</b>	<b>1,147,535</b>	<b>847,633</b>	<b>776,823</b>	<b>848,373</b>	<b>71,549</b>
<b>Pupil Referral Units</b>						
iCollege Alternative Provision	423,079	413,937	551,982	522,347	223,412	(298,935)
<b>Total PRUs</b>	<b>423,079</b>	<b>413,937</b>	<b>551,982</b>	<b>522,347</b>	<b>223,412</b>	<b>(298,935)</b>
<b>Total for all Schools</b>	<b>6,727,094</b>	<b>7,325,308</b>	<b>7,360,301</b>	<b>5,865,040</b>	<b>4,948,192</b>	<b>(916,848)</b>

# Agenda Item 13

## Schools Forum Work Programme 2026/27

	Item	Heads Funding Group Deadline	Heads Funding Group	Schools Forum Deadline	Schools Forum Meeting	Action required	Author and role
Term 6	Schools' Forum Membership and Constitution from September 2026			07/07/2026	13/07/2026	Decision	Jessica Bailiss ( <i>Democratic Services Officer</i> )
	Scheme for Financing Schools 2026/27	06/05/2026	13/05/2026	07/07/2026	13/07/2026	Decision	Edith Cheng ( <i>Finance Manager - Schools &amp; Child Care Services</i> )
	Surplus Balances and School Balance Statements	06/05/2026	13/05/2026	07/07/2026	13/07/2026	Decision	Edith Cheng
	SEND Commissioning and Efficiency Planning			07/07/2026	13/07/2026	Discussion/Comment	Tony Parker ( <i>Service Lead - Children's Commissioning</i> ) Ash Hussain ( <i>Senior Commissioner SEND and Joint Commissioning</i> )
	Deficit Schools	06/05/2026	13/05/2026	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
	Vulnerable Children's Grant - Annual Report for 2025/26			06/10/2026	12/10/2026	Discussion/Comment	Crystal Elkabbas ( <i>Principal Educational Psychologist &amp; SEMH Service Manager</i> )
	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 ( <i>Head of Early Years</i> )
	Education Budget Monitoring - Quarter 1	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Joshua Ngeresa/Ashley Milum ( <i>Service Director Education and SEND</i> )
	DSG Monitoring 2026/27 - Quarter 2			06/10/2026	12/10/2026	Discussion/Comment	Joshua Ngeresa/Ashley Milum
	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	Edith Cheng
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	Joshua Ngeresa
	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	Edith Cheng
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	Joshua Ngeresa
	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/Ashley Milum
	DSG Monitoring 2026/27 - Quarter 3			12/01/2027	18/01/2027	Discussion/Comment	Joshua Ngeresa/Ashley Milum
	Deficit Schools	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Edith Cheng

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