Notice of Meeting

Schools Forum

Monday 13 July 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 7 July 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
e-mail: jessica.bailiss@westberks.gov.uk

Further information and Minutes are also available on the Council's website at www.westberks.gov.uk

West Berkshire
COUNCIL

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

Agenda

Part I

Page No.

Items for Decision

Items for Discussion and Comment

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

SCHOOLS FORUM

MINUTES OF THE MEETING HELD ON MONDAY 15 JUNE 2026

Present: Reverend Mark Bennet (Church of England Diocese), Catherine Bernie (Academy Special Schools), Libby Bucknell (Maintained Primary Schools (Substitute for Kavash Bamfield), Nicolle Browning (Maintained Secondary Schools), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), Jacquie Davies (Pupil Referral Unit), Mel Godliman (Early Years PVI Settings), Richard Hand (Trade Union), Michelle Harrison (Maintained Primary Schools), Rebecca Hartley (Maintained Primary Schools), , Jon Hewitt (Maintained Special Schools), Steve Lewis (Academy Schools), Bret Melvill-Smith (Maintained Primary Schools), Gary Norman (Academy Schools), Chris Prosser (Academy Schools (Substitute for Charlotte Wilson), Graham Spellman ((Chair) Roman Catholic Diocese), Chloe Summerville (Maintained Nursery Schools) and Edwin Towill (Academy Schools)

Also Present: Edith Cheng (Finance Manager), Emma Ferrey (Interim Service Manager of SEND), Ashley Milum (Service Director for Education and SEND), Mollie McQuade (Finance Manager), Hine Thompson (Senior Finance Business Partner) and Jessica Bailiss (Democratic Services Officer)

Apologies for inability to attend the meeting: Jay Armstrong (Maintained Primary Schools), Kavash Bamfield (Maintained Primary Schools), Councillor Heather Codling (Deputy Leader & Executive Portfolio Holder: Children and Family Services), David Fitter (Academy Schools), Jo Lagares (Maintained Primary Schools), Keith Harvey (Maintained Primary Schools), Julie Lewry (Academy Schools), Jo MacArthur (Maintained Primary Schools), David Ramsden (Maintained Secondary Schools) and Charlotte Wilson (Academy Schools)

PART I

1 Election of Chair and Vice-Chair 2026-27

Ashley Milum invited the Schools' Forum to nominate and vote on the position of Chair for the coming year.

RESOLVED that Graham Spellman would continue as Chair of the Schools' Forum for the 2026/27 financial year.

Graham Spellman invited the Schools' Forum to nominate and vote on the position of Vice-Chair for the coming year.

RESOLVED that Keith Harvey would continue as Vice-Chair of the Schools' Forum for the 2026/27 financial year.

2 Minutes of previous meeting dated 19th January

The Minutes of the meeting held on 19th January 2026 were approved.

3 Actions arising from previous meetings

It was noted that the one action from the last meeting related to an item on the agenda and therefore had been completed.

4 Minutes from the Heads' Funding Group for Information

Ashley Milum drew attention to the minutes from the last meeting and provided a summary of discussions that had taken place at the Heads Funding Group (HFG). It was noted that discussions had taken place around school balances, the Scheme for Financing Schools, deficit schools, clawback arrangements and Education, Health and Care Plan (EHCP) timeliness.

It was further noted that an update had also been provided at the HFG regarding proposed training for Schools' Forum members, including consideration of an induction-style approach for new members, which could also be shared with existing members, with further work to develop this offer.

Reverend Mark Bennet queried whether concerns raised by schools regarding the cost and quality of bought-back services had been discussed at the HFG. Ashley Milum reported that this had been briefly raised but noted that a wider review of services for schools had been commissioned by the Local Authority (LA) and was currently underway. Findings were expected later in the summer term, after which the matter would be revisited by the HFG.

Councillor Iain Cottingham commented that the LA recognised concerns relating to the quality and value for money of services and confirmed that improving these areas remained a priority, including consideration of services currently procured externally by schools.

5 Declarations of Interest

There were no declarations of interest received.

6 Membership

Jess Bailiss provided a brief update on membership. It was reported that contact had been made with Newbury College regarding the post-16 representative, and a further update would be provided in due course once confirmation had been received.

7 Scheme for Financing Schools Consultation 2026/27 (Edith Cheng)

Edith Cheng introduced the report (Agenda Item 8), which sought approval of the proposed consultation on the updated Scheme for Financing Schools (SFS). It was proposed that the updated SFS go out to consultation with schools from 15th to 25th June 2026 and return to the next Schools' Forum in July for approval.

Edith Cheng reported that Issue 17 of the statutory guidance had been published in March 2026 and that officers had reviewed the local scheme accordingly. It was confirmed that no substantive changes had been introduced by the Department for Education and that the proposed amendments reflected local practice, including clarification around deficit recovery expectations, financial monitoring arrangements and proposed changes to financial software. It was recommended that the updated scheme be issued for consultation with maintained schools, with responses to be reported back to Schools' Forum for approval in July.

Brett Melvill-Smith queried whether the proposed consultation period should be adjusted, noting that although the consultation was stated to run from 15 to 25 June, it would not realistically be received by schools until the following day. Edith Cheng advised that the consultation dates could be amended to run from 16 to 26 June. Ashley Milum supported this suggestion, agreeing that this approach would be more practical and fair for schools.

The Chair drew the Forum's attention to the recommendation in section 2.1 of the report, The recommendation was proposed and seconded by maintained school members and at the vote the motion was carried.

RESOLVED that the Schools' Forum approved that the proposed SFS go out to consultation with all schools from 16th June to 26th June 2026, with adoption of the updated SFS scheduled for Schools' Forum approval at the next meeting in July.

8 EHCP Timeliness (Emma Ferrey)

Emma Ferrey introduced the report (Agenda Item 9) and outlined the headline issues in the report summary. It was noted that timeliness of EHCPs had reduced from 47% in 2024 to 22% in 2025. This was attributed primarily to increasing demand and capacity pressures within the SEN Assessment Team, which had not expanded in line with rising need.

Emma Ferrey drew attention to the table under section 4.4 of the report, which highlighted the number of assessments needing to be completed by a very small team of staff. It was noted that the threshold for agreeing to assess had been lowered in 2024 following a high number of tribunal challenges, and this had led to a substantial rise in assessments. It was further reported that each EHCP assessment represented a significant cost to the Local Authority (LA), estimated at approximately £10k per case.

Emma Ferrey reported that analysis had identified a range of factors contributing to reduced timeliness, including capacity constraints within the SEN Assessment Team, a backlog of Educational Psychologist advice and ongoing recruitment challenges. Increased parent-led requests, including privately commissioned assessments, alongside delays in schools responding to consultations, had also contributed, although it was recognised that schools were under significant pressure. It was further noted that an increase in schools challenging funding agreements had added to delays.

Emma Ferrey highlighted that data on the length of time taken to complete assessments had been included within the report (4.10) following a request from the Heads' Funding Group and did not show an improving picture. It was noted that there had been a significant increase in requests for EHCP assessments following the SEND White Paper reforms and it was noted that this trend would continue to be monitored as reforms progressed and awareness increased.

Emma Ferrey concluded that the SEN Assessment Team did not have sufficient capacity to meet current demand. While a number of actions were being explored, including the use of AI and a review of team structures, the primary challenge remained the volume of requests and the increasing complexity of need across the system.

Richard Hand queried whether the estimated cost of approximately £10k per EHCP assessment was borne entirely by the LA, and whether academies or academy trusts incurred any costs in this process. Emma Ferrey reported that while the majority of costs sat with the LA, there were contributions from other partners, including schools through staff time and the Integrated Care Board for specialist assessments.

In reference to Richard Hand's query, Gary Norman reported that there was a large cost to St Bart's from EHCPs. He advised that the LA requested costings from schools when considering placements, which was particularly time consuming. He raised concerns regarding the impact of EHCP demand on schools, particularly those receiving disproportionately high numbers of pupils with EHCPs and stressed that greater clarity was required regarding the criteria for allocating placements.

Gary Norman noted the level of pressure within the system, both locally and nationally and expressed concern that the LA was not currently meeting its statutory responsibilities for EHCP timeliness. He suggested that the current arrangements were unsustainable without increased capacity.

In response, Emma Ferrey reported that work was underway with schools that were accepting higher numbers of pupils with EHCPs. This included engagement with secondary headteachers to improve the consultation process, including work on phased transitions and cohort planning. She advised that a key priority was to strengthen support for schools where high numbers of pupils with EHCPs were being placed.

Ashley Milum encouraged that the concerns raised be fed back to the Department for Education through the consultation on the SEND White Paper. He recognised the pressures that schools were under and noted that national reforms were seeking to move towards a more equitable system, including a longer term shift away from EHCPs. Ashley Milum advised that work was ongoing to address both immediate challenges and longer term reforms, and that innovation and improved processes would be required to support this.

RESOLVED that the Schools' Forum noted the report.

9 Trade Union Facilities Time - Annual Report for 2025/26 (Richard Hand)

Richard Hand introduced the report (item 10), which provided an overview of Trade Union facility time for 2025/26 and highlighted key developments within the education sector. It was noted that the report included links to a range of national research and sector publications to provide helpful context to the issues raised.

Richard Hand reported that the introduction to the report highlighted the ongoing delay to the School Teachers' Pay Review Body (STRB) recommendations, which continued to create uncertainty for schools, particularly in relation to budgeting.

It was further reported that proposed pay increases were likely to place additional pressure on school budgets if not fully funded, and that funding remained a key concern for the sector. Richard Hand highlighted the wider financial context, noting that schools were continuing to operate within significant financial constraints.

Richard Hand also drew attention to a number of broader workforce and operational issues, including work being undertaken to support school leaders in managing increasing levels of complaints.

Richard Hand concluded by reporting on local developments, including the establishment of a Joint Negotiating Committee, which would provide a more structured forum for engagement on pay, policy and employment matters.

RESOLVED that the Schools' Forum noted the report.

10 DSG Outturn (Hine Thompson)

Hine Thompson introduced the report (Agenda Item 11), which sought to provide Schools Forum with a clear and transparent overview of the Dedicated Schools Grant (DSG) financial position at year-end. It set out actual expenditure against the budget, highlighted key variances, and reported the resulting surplus or deficit for each DSG block. It was noted that the report was for information only and no decisions were required.

Hine Thompson highlighted the key figures, including a cumulative deficit of £16.1m at the end of the 2024/25 financial year and an in-year deficit of £8.7m, which was approximately £5m lower than originally forecast due to changes in assumptions rather than savings. It was further reported that the cumulative deficit outturn for 2025/26 was projected to be £24.8m. A detailed breakdown of these figures had been provided within the report.

The Chair noted the challenging financial position and invited questions from members. No questions were raised.

RESOLVED that the Schools' Forum noted the report.

11 School Balances 2025/26 (Edith Cheng)

Edith Cheng introduced the report (Agenda Item 12), which set out the year-end balance position for maintained schools for 2025/26, highlighting those schools with a deficit or significant surplus. It was reported that total school balances as at 31 March 2026 had reduced by approximately £1.4m compared to the previous year, to around £7.6m. This continued a downward trend, particularly within the primary sector, where balances had declined for a third consecutive year, reflecting pressures from falling pupil numbers and increasing SEND needs.

Edith Cheng noted that a number of schools continued to hold surplus balances above the 10% threshold. In line with previous agreement, these schools had been identified and invited to submit balance statements for review.

Rebecca Hartley queried what plans were in place to support schools in deficit, noting that increasing SEND pressures and falling rolls were key drivers and that, in some cases, these factors were beyond the control of individual schools. Edith Cheng advised that discussions were ongoing regarding how best to manage the increasing number of deficit schools and confirmed that the matter would be taken forward and reported back in due course.

The Chair noted that a report on schools with surplus balances was due to be brought to the Forum in July and invited Ashley Milum to comment. Ashley Milum commented that they were aware that this was something that required a clear response. Once the consultation on the Scheme for Financing Schools (SFS) had concluded this would enable the LA to enact an approach and to implement appropriate levels of challenge and support within the system. He further advised that the issue had been discussed at the Heads' Funding Group and would continue to be considered at future meetings.

Reverend Mark Bennet raised concerns regarding the pressure on school business managers, noting that they were often working in isolated and challenging roles. He queried what support was being provided to ensure these key staff were adequately supported.

Brett Melvill-Smith queried what the LA was doing to look at schools with deficit budgets if they were categorised, including those in deficit due to financial management issues and those in deficit due to wider pressures such as falling rolls and increasing SEND needs.

Ashley Milum acknowledged the points raised and advised that support for business managers was being considered as part of wider school improvement planning for the next academic year. In response to Brett Melvill-Smith's query, he advised that maintained schools operated with delegated budgets however there was recognition of the increasing challenges posed by falling pupil numbers and rising SEND needs. It was noted that some schools in financial difficulty had falling pupil rolls, whilst others did not. Ashley Milum further advised that, once the SFS was agreed, it would enable the LA to implement different approaches for the two categories and it was noted that further categories might emerge that would require consideration

Hine Thompson reported that analysis was being undertaken to understand trends and the factors driving variations between schools in deficit. She advised that this work would inform the development of a plan going forward. It was noted that further work was required, including the use of forecasting tools to model different scenarios, and that proposals would be brought forward following further discussion with officers.

Councillor Iain Cottingham commented from a political perspective that there was a strong emphasis on collaboration between stakeholders, including schools, governors and the LA, to address the financial challenges being faced. He noted the ongoing pressures on school finances and emphasised that the priority remained working with all stakeholders to achieve the best outcomes for children.

Chris Prosser queried whether the LA was continuing to work closely with schools in deficit to develop deficit recovery plans, as had previously been the case. Hine Thompson advised that in some cases work was taking place with schools and this was linked to ongoing analysis and development of a broader approach, which required further alignment with services.

Chris Prosser sought further clarity on whether when a school entered deficit, the LA worked with them to produce a deficit recovery plan, as had been the case previously. Ashley Milum advised that all schools in deficit should have a clear recovery plan and acknowledged that where this was not taking place, further work was required to ensure this was implemented

Rebecca Hartley commented on the importance of ensuring that deficit discussions with schools considered the broader context of SEND need, noting that a purely financial approach could risk disincentivising schools from accepting pupils with additional needs. She emphasised the need for alignment between financial and SEND services when reviewing deficit positions.

Councillor Iain Cottingham suggested that a more structured, risk-based approach to monitoring school finances could be considered, enabling earlier identification of potential issues and more proactive support. He noted the importance of taking a holistic view of school performance rather than focusing solely on financial indicators.

Brett Melvill-Smith commented on the importance of ensuring that deficit budget reviews took account of context. He noted that schools in deficit often had limited flexibility to reduce costs due to falling pupil numbers and increasing SEND needs.

In response to the points raised, Ashley Milum reflected on the importance of context in addressing school deficits, noting that rising need and falling pupil numbers presented a system-wide challenge. He emphasised that schools in deficit must have clear recovery plans and that further discussion would be required at both individual school and Forum level. He also noted that there was no contingency funding available to support school deficits and emphasised the importance of timely action to support schools in returning to a balanced position.

RESOLVED that the Schools' Forum noted the report.

12 Forward Plan

RESOLVED that the Schools' Forum noted the forward plan.

13 Date of the next meeting

It was confirmed that the next meeting would take place on Monday 13 July 2026 at 5pm. It was noted that, due to timing within the school term, the meeting would be held virtually, although some members expressed a preference for occasional in person meetings. This was noted and consideration would be given to holding a future meeting in person, later in the year.

(The meeting commenced at 5pm and closed at 6.11pm)

CHAIR …………………………………………….

Date of Signature …………………………………………….

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Agenda Item 6

Scheme for Financing Schools

Report being considered by:	Schools' Forum		
Date of Meeting:	13 July 2026		
Report Author:	Kirsty Bray/Edith Cheng		
Item for:	Decision	**By:**	All Maintained Schools Representatives

1. Purpose of the Report

1.1 To discuss the responses to the consultation on the updated Scheme for Financing Schools.

2. Recommendation

2.1 To recommend to Schools Forum to approve the suggested amendment and publish and adopt the updated Scheme for Financing Schools by 13 July 2026.

Is the Schools' Forum required to make a decision as part of this report or subsequent versions due to be considered later in the meeting cycle?	
Yes: ☒	No: ☐

3. 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		
Consultation and Engagement:	All maintained schools			

4. Executive Summary

4.1 Local authorities are required to publish schemes for financing schools which set out the financial relationship between the local authority and the schools they maintain.

4.2 The Department for Education (DfE) issues statutory guidance for local authorities on schemes for financing schools. The DfE guidance lists the provisions which a local authority must, should or may include. Local schemes need not follow the exact format used in the DfE guidance, except for the text of directed revisions. The DfE guidance is updated annually.

4.3 Issue 17 was published on 26 March 2026 and can be found at:

[Schemes for financing local authority maintained schools 2026 to 2027 - GOV.UK]

4.4 In making any changes to the scheme, a local authority must consult all maintained schools in their area and receive the approval of the members of their Schools' Forum representing maintained schools.

4.5 The local authority has reviewed the current scheme to ensure that all sections are still appropriate. The proposed Scheme for Financing Schools (2026 update) and Appendix B highlighting the proposed updates were both emailed to schools.

4.6 The consultation period was undertaken for 10 working days from 16 June 2026.

5. Supporting Information

5.1 Eleven responses have been received with mixed replies. From the responses received, one school is happy with the changes and had no further comments to make. A further ten schools have concerns regarding the proposed changes. All responses have been attached as Appendix A.

5.2 Notwithstanding the responses received through the consultation, it is recommended that the proposed changes to the Scheme for Financing Schools remain unchanged.

The proposed approach aligns with the Department for Education's guidance and model Scheme for Financing Schools, ensuring that the local scheme reflects current national expectations and promotes consistent financial management across schools.

In addition, the local authority is anticipating an increasing number of schools entering deficit positions, with current projections indicating that around 20% of schools may be in deficit in the coming years.

Maintaining the proposed changes will strengthen financial oversight, support earlier intervention where financial difficulties arise, and help safeguard the long-term sustainability of school budgets across the sector.

6. Consultation and Engagement

Section 151 Officer
Service Director for Education and Special Educational Needs and Disabilities (SEND)

7. Appendices

7.1 Appendix A – School Consultation Responses

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Appendix A – Schools Consultation Responses
Scheme for Financing Schools – issue 17

1. Pangbourne Primary School

We had our monthly Fin Comm today and I was tasked with our feedback on this consultation.

Very briefly, we have one major concern which is in reference to these changes :

6) Point 5.3.1 updated to remove requirement for a deficit school to submit a 5 year budget plan.
7) Point 5.3.1 updated to confirm that deficit schools should show deficit recovery in three-year period.
8) Point 5.15 updated to confirm notice of concern may be issued when a school does not have a robust plan to repay the deficit within a maximum of three years.

Given the deficit situation at PPS (and,we understand, many other WB primary schools) it appears both counter-productive and massively demotivating to implement a REDUCTION in the deficit recovery horizon to 3 years when many governing boards are battling to hit 5 years. Furthermore, to reinforce this threat with the punishment of a 'notice of concern' and all that implies for EXTRA WORKLOAD for Governors (and SLTs) in our view runs a very real risk of multiple resignations from these unpaid posts.

2. Chieveley Primary School

Please find below Chieveley Primary School's response to the consultation on the proposed Scheme for Financing Schools 2026/27, submitted on behalf of the Finance Committee and Governing Body.

- Paragraph 5.15: We would welcome clarification on how the "robust plan" test will be applied to schools whose deficit is driven by falling pupil numbers rather than financial mismanagement. Our current deficit recovery plan is forecast to return to surplus within the prescribed period, but with a narrow margin. Given the sensitivity of multi-year forecasts to factors outside the school's control; funding formula changes, pay awards, in-year pupil number movements, we would value reassurance that a single year's adverse variance pushing recovery back by one year would not, in itself, automatically trigger a notice of concern under criterion 5 (repayment period increasing) without a prior conversation with the school.
- Paragraphs 5.3.1 / 7.9: Could the authority clarify whether the three-year recovery period is assessed against a fixed reference point (e.g. the date a deficit was first identified or licensed) or recalculated at each annual forecast submission? This affects how schools like ours, recovering on a tight margin, should plan around the rolling nature of the requirement.
- Paragraph 5.3.1: We note the removal of the five-year budget plan requirement for deficit schools. While we understand the intent to reduce administrative burden, the five-year plan previously gave the authority visibility of the longer-term trajectory even where the three-year headline figure was tight. Would the authority be willing to confirm that schools may continue to

submit a longer, indicative forecast alongside the mandatory three-year plan, on a voluntary basis, where this would provide useful additional assurance?

- Paragraph 7.9: We note that since the last issue, five schools have left the maintained sector for academy status (Basildon, Compton, The Downs, John Rankin Infant & Nursery, and John Rankin Junior). As licensed deficits are backed by the collective surplus of school balances held by the authority on behalf of maintained schools, a reducing pool of contributing schools may in time reduce the capacity available to support deficit arrangements for those schools that remain maintained. We would welcome confirmation from the authority that this trend has been factored into ongoing planning, and that capacity to support existing and future licensed deficit arrangements is not expected to be constrained as a result.
- Paragraph 5.1.2: As a school operating under a licensed deficit, we already submit monthly budget monitoring reports to Schools Accountancy under the terms of paragraph 7.9, including forecasts from P6 onwards. We would ask the authority to confirm how the new universal requirement for P3, P6 and P9 forecasts interacts with this existing obligation, so that we can avoid duplication of effort for school finance staff.We would also question the value of a P3 forecast specifically. At that point in the year, schools will typically not yet have confirmation of support staff pay awards, which materially affects forecast accuracy. We would ask whether the requirement could begin from P6, in line with our existing licensed deficit reporting, or whether the authority sees a specific purpose for a P3 submission that we should be aware of.

We would be happy to discuss any of the above with the Schools Accountancy team ahead of our next budget submission in May 2027.

3. Victoria Park Nursery

Response to Consultation on the Proposed Scheme for Financing Schools

Thank you for sharing the consultation on the proposed Scheme for Financing Schools.

Please find below a collective response from the Chair of Finance, Headteacher, and School Business Manager at Victoria Park Nursery School.

We would welcome greater flexibility in how schools manage their financial resources. In particular, we would strongly support the removal of the clawback process, as this would enable schools to retain and reinvest surplus funds into their own development priorities in a timely and strategic way.

If removal is not possible, we would ask that West Berkshire Council consider increasing the level of surplus that schools are permitted to hold. This would provide a more realistic buffer given financial uncertainties and support longer-term planning.

Should the clawback process remain in place, we request that self-generated income—specifically income from fee-paying pupils and lettings—is included in clawback calculations. These funds are raised independently by schools and are critical to sustaining and enhancing provision.

In relation to financial reporting requirements, we would like to request the removal of P3 reporting to WBC. At this point in the financial year, Early Years funding allocations have neither been confirmed nor paid via the Early Years funding portal, meaning any figures reported are based solely on budget assumptions already submitted.

Additionally, we would ask that P6 reporting is also reconsidered. Maintained nursery schools are funded differently from primary schools and will typically have received

only one of three funding payments by this stage. As a result, reporting at P6 does not provide an accurate reflection of financial position until actual revenue streams are confirmed by WBC. We believe that P9 reporting would offer a much more reliable and meaningful picture of income and expenditure.
Finally, we would welcome clarification on the resourcing implications of these proposals. Specifically, does WBC have the additional capacity within Schools Accountancy Services to review the increased volume of budget reports without increasing the cost of the Finance Buyback service? If additional resource is required, it would be helpful to understand how these costs will be managed and who will bear them.

<u>4. Burghfield St Mary's Primary School</u>
Burghfield St Mary's C of E Primary School has reviewed the consultation documents and proposed amendments to the Scheme for Financing Schools 2026. We have no comments to make on the proposed revisions and are content with the updated Scheme.

<u>5. St John & St Nicolas Schools Federation</u>
St John and St Nicolas Schools Governors broadly agree with the scheme for financing schools but have the following concerns:

- More frequent reporting requirements for Imprest schools:
  Instead of reporting to the LA only at Period 9, we will now need to produce reports at Periods 3, 6, and 9. We are comfortable with P6 and P9; however, P6 still relies on a number of assumptions. We would suggest removing P3, as it is unlikely to provide a meaningful indication of the school's budget forecast and may lead to decisions being taken, which might be mitigated later in the period.
- Removal of the five-year forecast for deficit schools:
  Whilst, we understand the rationale of moving to a three year forecast for deficit recovery, this may put undue pressure on schools and could significantly worsen outcomes for pupils.

<u>6. Birch Copse Primary School</u>
Further to your message regarding the above consultation, the governing board has reviewed the document and have put forward the query below regarding an **inconsistency between paragraphs 4.3 and 15.1.**

Paragraph 4.3 reads as follows:

"Maintenance of schools

"The authority is responsible for maintaining the schools covered by the scheme, and this includes the duty of defraying all the expenses of maintaining them (except in the case of a voluntary-aided school where some of the expenses are, by statute, payable by the governing body). Part of the way an authority maintains schools is through the funding system put in place under sections 45 to 53 of the act."

In lay terms, this means that WBC is responsible for the repair and maintenance of its schools - i.e., paying for repair and maintenance. This is logical given that schools are WBC property.

On the other hand, **paragraph 15.1** includes the following wording:

"Responsibility for repairs and maintenance

"The authority delegates funding for repairs and maintenance to schools. Only capital expenditure is retained by the authority. For these purposes, expenditure may be treated as capital only if it fits the definition of capital used by the authority for financial accounting purposes in line with the Chartered Institute of Public Finance and Accountancy (CIPFA) Code of Practice on local authority accounting. The authority uses a de-minimis limit of £10,000 for defining capital in its own financial accounts, this sum applies to the total cost of the scheme and not individual items. The same de minimis limit is used in defining what is delegated."

This raises two questions:

(a) Is the local authority responsible for maintaining schools and paying for repairs and maintenance, or not?
(b) If schools are responsible for repair and maintenance, who is responsible for deciding whether any proposal is a repair and maintenance job or a capital job?

7. Hermitage Primary
Thank you for sharing the draft Scheme for Financing Schools 2026/27.
Following review, we would like to formally register our disagreement with the proposed changes, particularly those relating to deficit recovery timelines and lack of understanding of operational realities of school.

1. Objection to tightening of the deficit recovery period

We do not agree with the reduction in the maximum deficit recovery period from five years to three years. The current scheme strikes an appropriate balance by setting a three-year recovery as the expectation, while allowing flexibility up to five years where justified by local circumstances. Removing this flexibility is, in our view, overly restrictive and not reflective of the realities schools are facing, including volatility in pupil numbers, increasing SEND and staffing pressures and limited ability to make rapid structural changes without educational impact. A fixed three-year recovery requirement risks forcing short-term decisions that are not in the best interests of pupils or long-term sustainability. We strongly believe that professional judgement and local context must remain central to deficit planning, and that the existing five-year maximum should be retained.

2. Concern regarding increasingly restrictive intervention framework

We are also concerned that the proposed changes represent a broader shift toward tighter compliance thresholds, earlier intervention triggers and more rigid assessment criteria without a corresponding increase in support offered to schools. While we recognise the importance of financial discipline, the current proposals appear to place greater emphasis on control and restriction rather than active partnership and support.

3. Need for a more proactive, supportive LA approach
We would like to see West Berkshire Council place greater focus on proactively supporting schools to improve their financial position, rather than primarily tightening the framework within which they operate. We would welcome a more hands-on support in financial planning and modelling, greater use of locally informed data (e.g. pupil trends), practical support to identify and deliver sustainable cost efficiencies and collaboration with schools to develop realistic, evidence-based recovery plans. A strengthened partnership approach would, in our view, be more effective than increasingly restrictive controls in achieving sustainable financial outcomes. This partnership would likely require an extension to the resources within the Schools Accountancy department at WBC. We note that the current team are already stretched to capacity and investment would be better sought in extending the team so they can more actively assist schools with practical and proactive support.
In summary, we do not support the move to a fixed three-year maximum recovery period, do not support the associated tightening of intervention thresholds but would strongly encourage a shift toward more proactive and practical LA support for schools We remain committed to working collaboratively with the Local Authority and would welcome further discussion on how the scheme can better balance financial accountability with practical delivery and school sustainability.

8. Spurcroft Primary School

Thank you for the opportunity to comment on the proposed update to the Scheme for Financing Schools. The Governing Board of Spurcroft Primary School and Nursery discussed the update at our meeting on 24 June 2026. We have two points to raise.

1. Budget monitoring at P3, P6 and P9

We note the proposed change to paragraph 5.1.2, requiring all maintained schools to submit budget monitoring forecasts at P3, P6 and P9 within one month of each quarter end, rather than the current arrangement. We support the principle of regular and robust budget monitoring and would not object to reporting at P6 and P9.

However, we would ask the Council to reconsider the inclusion of P3 as a reporting point. In our experience, the P3 position is not yet sufficiently complete or reliable to support meaningful monitoring. By way of example, at the point P3 would fall due this year, teachers' pay awards had not yet been allocated, and our budget for the financial year had not been agreed by the Council or uploaded to Agresso or SBS, meaning the school is not in a position to monitor against an approved budget at that stage, regardless of the quality of its own internal record-keeping.

We would therefore ask that the Council put forward P6 and P9 as the reporting points for budget monitoring and reconsider the requirement to report at P3 until the underlying data, particularly pay awards and Council-approved budgets, is reliably available by that point in the year.

2. Deficit recovery period

We note the changes to paragraph 5.3.1, removing the requirement for a deficit school to submit a separate five-year budget plan, and confirming that deficit recovery should be shown within a three-year period, alongside the related update to paragraph 5.15 (Notice of Concern). We understand these to be clarifications of the Scheme's existing position at paragraph 7.9 (Licensed Deficits) rather than a new reduction in the recovery period.

As a school currently in a multi-year deficit recovery position, we would welcome the opportunity to discuss with the Council how this clarification applies to our own circumstances and would be grateful for any guidance the Council can offer schools in a similar position as this change takes effect.

9. Downsway Primary School

Having sent this document to our Governing Board, the only comment we have to return to you is a concern over the value of the submission of a budget monitoring forecast at P3. It was felt that as pay reviews are often not finalised at this point, it may not reflect the most accurate position.

10. St Pauls Roman Catholic Primary School

As a governing body and school leadership team we have the following comments to make on the proposals

Does the authority have the capacity for this level of scrutiny? E.g. We are now in p3 and our budget has still not been entered on to the system.

This feels a lot more stick than carrot, how will the authority ensue that schools feel supported rather than targeted

11. Yattendon Primary School

After consulting with Governors, our co-ordinated response is that the governors feel strongly against the proposal in 5.1.2 to submit full budget monitoring forecasts at P3 given this is so early into a new budget and the additional burden this would place on staff. Any figures would not be meaningful because at P3 we are usually not aware of pay awards for both teachers and support staff so the forecast would be very similar to the set budget at such an early stage in the financial year.

Governors were also not happy about the proposal that a school with deficit budget should be showing recovery within three years instead of five when in practice this could be unachievable given the ever-increasing costs for schools particularly in terms of staffing, WB service buybacks and energy.

Schools' Forum Membership and Constitution from September 2026/27

Report being considered by:	Schools' Forum		
Date of Meeting:	13th July 2026		
Report Author:	Jessica Bailiss		
Item for:	Decision	**By:**	All Forum Members

1. Purpose of the Report

1.1 To review and where necessary update the membership and Constitution of the Schools' Forum for 2026/27.

2. Recommendation

2.1 That the Schools' Forum approve the Constitution for 2026/27, including an update to the attendance provisions to reflect the Forum's current meeting cycle, and minor consequential amendments to reflect the revised membership composition set out in the report.

2.2 That the Schools' Forum approve the revised membership composition for 2026/27, as set out in this report, to reflect recent academy conversions and maintain a total membership of 26, with any variance managed in accordance with the approach set out in section 4.11.

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: ☐

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			The report aims to review and where necessary update the membership and Constitution of the Schools' Forum. This will help to ensure that pupils are fairly represented at the Schools' Forum. The refreshed Constitution will be published on the Schools' Forum's webpage.

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		

3. Executive Summary

Issue Identification

3.1 The Schools' Forum is required to review its membership and Constitution regularly to ensure compliance with statutory guidance and that representation remains broadly proportionate to pupil numbers across school sectors. The Constitution was last approved following the governance review in October 2025.

3.2 The membership needs to be reviewed to see if the split based on pupil numbers remains appropriate. Since the last review, a number of schools in West Berkshire have converted to academy status. The January 2026 schools census data shows there has been an increase in the number of pupils in the academy sector and indicates that the existing membership composition no longer fully reflects the balance of pupils across sectors in the district (set out in detail under section 4).

Proposals

3.3 This report proposes a revised membership composition for the Schools' Forum for 2026/27 to reflect the changes in pupil numbers. The proposal maintains the overall size of the Forum at 26 members as the intended composition and ensures continued compliance with statutory requirements, including the requirement that school and academy members make up at least two-thirds of the total membership.

3.4 It is recognised that in implementing the revised membership, the Forum may operate with a small variance from the proposed membership structure. This variance will be managed in accordance with the approach set out in 4.11 of the report. The membership with this small variance is considered to remain broadly proportionate to pupil numbers and therefore compliant with the requirements of the Schools' Forums (England) Regulations 2012.

3.5 In addition, to better reflect the Forum's current meeting cycle, a minor amendment is proposed to the Constitution's attendance provisions. As there are no Forum meetings scheduled between February and May, the current six-month non-attendance rule (section 2.10 of the Constitution) would be replaced with a meetings-based provision.

3.6 The Schools' Forum is invited to approve the revised membership (under Table 3) and Constitution from September 2026, as set out in this report.

Monitoring and Evaluation

3.7 The membership and Constitution of the Schools' Forum are reviewed by the Schools' Forum on an annual basis to ensure continued compliance with statutory requirements and that representation remains broadly proportionate to pupil numbers.

4. Supporting Information

Schools' Forum Constitution

4.1 The current Constitution complies with the Schools' Forums (England) Regulations 2012 and there have been no legislative changes requiring amendment.

4.2 A minor amendment to the attendance provisions of the Constitution is considered appropriate to better reflect the Forum's current meeting cycle. As there are no Forum meetings scheduled between February and May, the current six month non-attendance rule (section 2.10 of the Constitution) would be replaced with a meetings based provision, whereby a member may cease to be a member following failure to attend three consecutive meetings (or organise an appropriate substitute), unless a reason for non-attendance has been approved beforehand.

4.3 Subject to the Forum's agreement, the Constitution will be updated accordingly and published on the Schools' Forum webpage. Forum members are also invited to suggest any further changes they consider necessary or desirable.

Membership

4.4 Due to a shift in pupil numbers, based on the January 2026 data, a change to the Forum's membership composition needs to be considered.

4.5 The current rules in respect of the Schools' Forum membership are as follows:

(1) The need to have full representation for the various types of school with the number of members representing each being broadly proportionate to the number of pupils in each phase. This is to ensure debate within the Schools' Forum is balanced and representative.

(2) There is no minimum or maximum number of members, but non-school members must not make up more than one third of the total membership. However, care should be taken to keep the Schools' Forum to a reasonable size to ensure that it does not become too unwieldy.

4.6 Table 1 below details the current breakdown in pupil numbers between the three main groups based on the January 2025 and January 2026 census data. It can be seen that there has been a significant shift in pupil numbers to the academy sector. The shift in numbers is due to the Downs secondary school and John Rankin, Basildon, Compton and Streatley primary schools converting to academies.

TABLE 1	Pupil Numbers (Jan 25 census)		Pupil Numbers (Jan 26 census)	
	Number	%	Number	%
Primary Schools	(61) 11,164	43%	(56) 9921	39%
Secondary Schools	(3) 4350	17%	(2) 2891	11%
Academy Schools	(13) 10,209	40%	12,565 (19)	50%
TOTAL	25,723	100%	25,377	100%

*(*The number of schools in each sector is shown in brackets and pupil numbers include nursery and sixth form)*

4.7 The membership composition for 2025/26 was as follows:

TABLE 2					
School Members	**Heads**	**Governors**	**Other**	**Total**	
	Number	Number	Number	Number	**%**
Primary	4	3	1	8	43%
Secondary	3	0	0	3	17%
Academies	5*	2	0	7	40%
Total	**12**	**5**	**1**	**18**	100%
Other School Members					
Nursery Schools	1			1	
Special Schools	1			1	
iCollege (PRU)	1			1	
Academy Special Schools	1* *(included above)*				
Total				**3**	
Non School Members					
RC Diocese			1	1	
C of E Diocese			1	1	
Early Years PVI			1	1	
Trade Union			1	1	
Non School Post 16			1	1	
Total				**5**	
TOTAL MEMBERSHIP	**15**	**5**	**6**	**26**	
Proportion of School Members (minimum must be 66.7%)				**80.8%**	

4.8 It was noted as part of the governance review in 2025 and survey with Forum members, that the overall membership number of 26 was about right and should not increase. It was noted however, that this can be reviewed if felt necessary as part of any future annual review. The Department for Education's Operational and Good Practice Guide for Schools' Forums sets out that care should be taken to keep schools' forums to a reasonable size to ensure that it does not become too unwieldy.

4.9 Table 3 below, shows the revised membership composition based on the change in pupil numbers and is based on the overall membership number remaining the same (26).

4.10 As part of the governance review, it was agreed that the special academy representative should take the place of the long standing vacancy in the academy group so this arrangement has been continued in the proposed membership composition set out below.

TABLE 3					
School Members	**Heads**	**Governors**	**Other**	**Total**	
	Number	Number	Number	Number	**%**
Primary	4	2	1	7	39
Secondary	2	0	0	2	11
Academies	6*	3	0	9	50
Total	**12**	**5**	**1**	**18**	100%
Other School Members					
Nursery Schools	1			1	
Special Schools	1			1	
iCollege (PRU)	1			1	
Academy Special Schools	1* *(included above)*				
Total				**3**	
Non School Members					
RC Diocese			1	1	
C of E Diocese			1	1	
Early Years PVI			1	1	
Trade Union			1	1	
Non School Post 16			1	1	
Total				**5**	
TOTAL MEMBERSHIP	**15**	**5**	**6**	**26**	
Proportion of School Members (minimum must be 66.7%)				**80.8%**	

4.11 The reduction in primary representation by one place would be managed through a natural vacancy arising over time. As a result, the Forum may exceed the proposed number of representatives within this group for a period of time, which remains consistent with the requirement for broadly proportionate representation. The reduction in secondary representation by one place has already been accommodated through a vacancy arising following the conversion of The Downs School to academy status.

4.12 It is proposed that the two additional academy places comprise one headteacher representative and one governor representative, in order to maintain a balanced range of perspectives and reflect the current composition within the academy group.

4.13 Subject to the Forum’s agreement, the Constitution will be updated to reflect the revised membership composition.

5. Conclusion

5.1 The annual review of Schools’ Forum membership has identified that recent academy conversions have altered the distribution of pupils across school sectors in West Berkshire. The proposed revisions to membership reflect this updated pupil profile while maintaining the overall size of the Forum at 26 members and compliance with statutory requirements.

5.2 The Schools’ Forum is therefore invited to approve the revised membership and Constitution from September 2026.

6. Consultation and Engagement

Chair of the Schools Forum
Service Director – Education and SEND
Democratic Services Manager

7. Appendices

Appendix A: Equalities Impact Assessment
Appendix B: Constitution of the Schools Forum
Appendix C: Membership of the Schools Forum

Appendix A

West Berkshire Council

Equity Impact Assessment

TEMPLATE
March 2023

Contents

Section 1: Summary details

Directorate and Service Area	West Berkshire Schools' Forum
What is being assessed (e.g. name of policy, procedure, project, service or proposed service change).	The Schools' Forum's Constitution and Membership for 2026/2027
Is this a new or existing function or policy?	Existing
Summary of assessment Briefly summarise the policy or proposed service change. Summarise possible impacts. Does the proposal bias, discriminate or unfairly disadvantage individuals or groups within the community? (following completion of the assessment).	This assessment relates to the annual review of the Schools' Forum's Constitution and membership for 2026/27. Only a positive impact from carrying out this work has been identified. The review helps to ensure that pupils continue to be fairly represented at the Schools' Forum. The refreshed Constitution will be published on the Schools' Forum webpage.
Completed By	Jessica Bailiss
Authorised By	Stephen Chard (Democratic Services Manager)
Date of Assessment	May 2026

Section 2: Detail of proposal

Context / Background Briefly summarise the background to the policy or proposed service change, including reasons for any changes from previous versions.	The Schools' Forum Constitution and Membership are reviewed annually and brought to the Forum each July for consideration. A review of the membership is undertaken to ensure if the split based on pupil numbers is still correct or needs to be changed.
Proposals Explain the detail of the proposals, including why this has been decided as the best course of action.	The proposals are set out in section 3 of the report.
Evidence / Intelligence List and explain any data, consultation outcomes, research findings, feedback from service users and stakeholders etc, that supports your proposals and can help to inform the judgements you make about potential impact on different individuals, communities or groups and our ability to deliver our climate commitments.	Set out in Section 4 of the report.

Alternatives considered / rejected Summarise any other approaches that have been considered in developing the policy or proposed service change, and the reasons why these were not adopted. This could include reasons why doing nothing is not an option.	Forum Members are invited to suggest any changes which they deem necessary or desirable.

Section 3: Impact Assessment - Protected Characteristics

Protected Characteristic	No Impact	Positive	Negative	Description of Impact	Any actions or mitigation to reduce negative impacts	Action owner* (*Job Title, Organisation)	Timescale and monitoring arrangements
Age	☐	☒	☐				
Disability	☒	☐	☐			.	
Gender Reassignment	☒	☐	☐				
Marriage & Civil Partnership	☒	☐	☐				
Pregnancy & Maternity	☒	☐	☐				
Race	☒	☐	☐				
Sex	☒	☐	☐				
Sexual Orientation	☒	☐	☐				
Religion or Belief	☒	☐	☐				

Section 3: Impact Assessment - Additional Community Impacts

Additional community impacts	No Impact	Positive	Negative	Description of impact	Any actions or mitigation to reduce negative impacts	Action owner (*Job Title, Organisation)	Timescale and monitoring arrangements
Rural communities	☒	☐	☐				
Areas of deprivation	☒	☐	☐				
Displaced communities	☒	☐	☐				
Care experienced people	☒	☐	☐				
The Armed Forces Community	☒	☐	☐				

Section 4: Review

Where bias, negative impact or disadvantage is identified, the proposal and/or implementation can be adapted or changed; meaning there is a need for regular review. This review may also be needed to reflect additional data and evidence for a fuller assessment (proportionate to the decision in question). Please state the agreed review timescale for the identified impacts of the policy implementation or service change.

Review Date	May 2026
Person Responsible for Review	Jessica Bailiss
Authorised By	Stephen Chard (Democratic Services Manager)

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CONSTITUTION OF THE WEST BERKSHIRE SCHOOLS' FORUM

Background

1. The West Berkshire Schools' Forum (hereafter referred to as "the Forum").

2. The requirement to establish a schools forum comes from the Education Act 2002. The main purpose of the Forum is to consider aspects of the relationship between schools and the local authority relating to financial matters.

3. The Forum is a decision making and consultative body in relation to matters concerning schools' budgets as defined in the School and Early Years Finance (England) Regulations 2014, the Schools Forum Regulations 2012 and the School Budget Shares (Prescribed Purposes) (England) 2002. The Schools Forum Regulations 2012 govern the composition, constitution and procedures of Schools' Forums.[1]

This document is divided into 3 sections:

A. Terms of Reference of the West Berkshire Schools' Forum
B. Membership of the West Berkshire Schools' Forum
C. Operating Conventions of the West Berkshire Schools' Forum

A. TERMS OF REFERENCE OF THE FORUM

1.1 Status of the Forum

The Forum is established in accordance with Sections 47(1) 47A of the School Standards and Framework Act 1998 and The Schools Forums (England) Regulations 2012.

1.2 Annual Decisions:

The overarching areas on which the Forum makes decisions on Local Authority (LA) proposals are:

- De-delegation from mainstream maintained schools' budgets for prescribed services to be provided centrally.
- To create a fund for significant pupil growth in order to support the LA's duty for place planning and agree the criteria for maintained schools and academies to access this fund.
- To create a fund for falling rolls if a schools' surplus capacity is likely to be needed within the next three years to meet rising pupil numbers and agree the criteria for maintained schools and academies to access this fund.
- Agreeing other centrally retained budgets, including for LA statutory responsibilities.
- Funding for central early years expenditure.

[1] These Regulations can be accessed at: https://www.legislation.gov.uk/uksi/2012/2261/contents

- Approval to move up to 0.5% from the school's block to other blocks.
- Revisions to the LA's Scheme for Financing Schools.
- The Forum's input to the LA's budget-making process.

1.3 Annual Consultation:
The LA must consult the Forum annually in connection with various schools' budget functions, namely:

- Amendments to the school funding formula.
- Changes to the Minimum Funding Guarantee to go to the DfE for approval.
- Funding arrangements for pupils with special educational needs in particular the places to be commissioned by the LA and schools and the arrangements for paying top-up funding.
- Funding arrangements for the use of pupil referral units and the education of children otherwise than at school, in particular the places to be commissioned by the LA and schools, and the arrangements for paying top-up funding.
- Funding arrangements for early years provision.
- Central spend on children and young people with high needs.
- Central spend on licenses negotiated centrally by the Secretary of State.
- Administrative arrangements for the allocation of central government grants paid to schools via the LA.
- Where the LA is entering a contract to be funded from the school's budget, that is in excess of the Public Contracts Regulations procurement thresholds.
- Any DfE consultations and changes to school funding for which the Forum's views are sought.

B. <u>MEMBERSHIP OF THE FORUM</u>

2.1 Membership

Forum Members are expected to take a strategic view of the whole education system while also advocating for the group they represent.

2.2 Composition

Schools' Forums' Regulations 2012 state that the primary schools, secondary schools and academies must be broadly proportionately represented on the Forum having regard to the total number of registered pupils. The proportionality of the membership will be reviewed annually (in June/July) so that elections, if required, can be held by the end of the summer term ready for the new academic year.

The Forum shall in total comprise of 26 members being 21 school members (including Academies) and 5 non school members. The school members shall be Headteachers, Governors or Early Years representatives drawn from the schools / partnerships in the West Berkshire LA area. The Primary and Secondary Headteacher members groups may also include, at the LA's discretion, representatives of Headteachers - senior members of staff, such as School Business Managers.

The LA has the discretion to divide the groups set out below in 2.2, for example the ratio of Headteachers or their Representatives and Governors in each group.

2.3 School Members
The current number of representatives in each phase is as follows:

a) **Primary Headteachers or their Representative and Governors**
8 representatives from primary schools of which at least 4 must be Headteachers or their representative.

b) **Secondary Headteachers or their Representative and Governors**
3 representatives from secondary schools of which at least 2 must be Headteachers or their representative.

c) **Special School Representatives**
1 representative from the special schools.

d) **Nursery School Representatives**
1 representative from the nursery schools.

e) **Pupil Referral Unit Headteachers or their Representative**
1 representative from the Pupil Referral Units.

f) **Academy Proprietor Body Representative, Headteachers/their Representative and Governors**
7 representatives from the Academies, as elected by the proprietors of the Academies, of which at least 4 must be Proprietor Body Representatives/Headteachers or their representative. 1 Academy representative must be from an Academy Special School.

2.4 Election of Schools Members
The primary school and secondary school headteacher representatives shall be elected by their respective Heads Forum.

Academy representatives shall be elected by the Academies proprietors.

Governors shall be elected though an election process coordinated by the Clerk to the Schools' Forum.

The special school representative shall be elected by mutual agreement between the two special schools.

The nursery school representative shall be elected by mutual agreement between the two nursery schools.

The pupil referral unit representative shall be elected by mutual consent between the pupil referral units.

Support can be requested by Heads' Forums for the Clerk to the Schools' Forum to help manage their election process. The Clerk of the Schools' Forum must make a record of the process by which the constituents of each group elect their nominees to the Forum.

There should be no more than two representatives from one school/academy across the groups that make up the Schools' Forum. This will be assessed as part of the election process.

An election scheme must take into account the following factors:

- The process for collecting names of those wishing to stand for election.
- The timescale for notifying all constituents of the election and those standing.
- The arrangements for dispatching and receiving ballots.
- The arrangements for counting and publicising the results.
- Any arrangements for unusual circumstances, such as only one candidate standing in an election or where there is a tie between two or more candidates.
- Whether existing members can stand for re-election.

If an election does not take place by any date set by the LA or any such election results in a tie between two or more candidates the LAy will appoint the schools member.

2.5 Non-School Members
In addition to the 21 school members a representative of the following groups will have full voting rights within the Forum except for voting on the funding formulae where only the Early Years PVI Provider representative can vote:

- Roman Catholic Diocese
- Church of England Diocese
- Trade Union
- Early Years PVI Provider
- Non school Post 16

The representative will be elected by their group and the record of the appointment process will be held by the Clerk of the Schools' Forum.

2.6 Substitute Members
Representative groups may nominate permanent substitutes who have sufficient experience and knowledge of schools funding to attend meetings.

and/or

A stand-in substitute who attends as a full voting member if a headteacher or permanent substitute is unavailable. Stand-in substitutes may attend some meetings as an observer to gain an insight into the work of the Forum.

The Clerk must be notified in writing 24 hours before the start of the meeting that a substitution will be required. Substitute members will have full voting rights when taking the place of the substantive member for whom they are the designated substitute.

2.7 Participation of Observers
Observers shall be invited to attend Forum meetings. Observers may participate in the debate but will not have voting rights should any business of the Forum require a vote. The following groups shall be asked if they would like to nominate an observer (and a named substitute) to the Forum:

- The Education and Skills Funding Agency (ESFA)

2.8 Council Officers and Elected Members
The following may attend and speak at Forum meetings in an advisory capacity only and will be invited to attend Forum meetings:

- Executive Director (Children's Services) or their representative
- Service Director - Finance, Property and Procurement or their representative
- Children and Young People Portfolio Holder
- Finance Portfolio Holder
- Clerk to the Schools' Forum

2.9 Terms of Office
The term of office for members of the Forum is four years. The same members can be reappointed providing they are re-elected by the group that they represent. This also applies to any permanent substitutes. A Governor representative reaching the end of their term can stand again for re-election through an election process run by the Schools' Forum Clerk.

As well as the term of office coming to an end, a schools member ceases to be a member of the Schools' Forum if he or she resigns from the Forum, giving at least one month's written notice, or no longer occupies the office which he or she was nominated to represent. An election should be held within the outgoing members electing group to nominate a successor. The Clerk will then inform the Forum members of the result of the election within one month.

2.10 Failure to attend meetings
Where a member of the Schools' Forum fails throughout a period of six consecutive months from the date of their last attendance to attend a meeting of the Forum (or to organise for an appropriate substitute to attend on their behalf), then subject to certain exceptions, they will cease to be a member of the Schools' Forum unless the failure was due to some reason approved before the expiry of that period.

C. OPERATING CONVENTIONS OF THE WEST BERKSHIRE SCHOOLS FORUM

3.1 Ordinary Meetings
An ordinary meeting of the Forum shall be held, at a minimum, four times a year.

3.2 Administration of Meetings
Meetings of the Forum shall be convened by the LA, who will arrange the clerking and recording of meetings. The cycle of annual meetings is based on the financial year. All the meeting dates for the next financial year are set by the end of March every year.

Items for consideration by the Forum shall be submitted to the Clerk no later than ten working days prior to the meeting. The agenda and working papers should be circulated a week in advance of the meeting date. Every effort should be made to circulate draft minutes to Forum members within ten working days of the meeting.

3.3 The Chair and Vice Chair
The Chair and Vice-Chair shall be elected from within the membership of the Schools' Forum (but may not be either an elected member or an officer of the local authority).

3.4 Quorum
The Forum shall be quorate if at least 40% of the total membership is present (this excludes observers). If the Forum is not quorate the meeting can proceed and the members present can give advice to the LA, but the authority is not obliged to take that advice into consideration. Decisions on the schools' budgets may not be taken unless 40% of the school members (Headteachers and Governors) are present.

3.5 Voting
Each member shall only have one vote. Voting shall be by a named vote if the meeting is held virtually or by a show of hands if in person. If there are equal numbers of votes for and against, the Chair will have a second or casting vote. There will be no restriction on how the Chair chooses to exercise a casting vote.
When the vote is on the schools funding formula only the schools' members and the Early Years Representative are eligible to vote.

3.6 Sub-Committees and Working Groups
The Forum may have sub-committees or working groups. The Forum shall receive reports from the sub-committees or working groups to approve formally.

3.7 Declaration of Interest
Any member of the Forum who has an interest in any proposal, beyond the generality of the group that they represent, shall declare the interest at the beginning of the relevant item. Should the member declare a prejudicial interest then they can explain any issues to the meeting and then must leave the meeting until the item has finished. The member cannot vote on that item. Members may remain in the case of a personal interest.

Where it is clear that a decision in which a member has an interest is likely to arise at a particular meeting, the meeting concerned may invite a substitute member (with no interest to declare) in accordance with the Constitution to attend the meeting in their place. Elected members are subject to the governance of the Council's Code of Conduct.

3.8 Status of Reports
All report authors will be responsible for informing the Clerk in advance of the status of reports to be included in the agenda i.e. confidential or non-confidential.

3.9 Expenses
The LA shall maintain a budget for the reimbursement of all reasonable expenses relating to the operation of the Forum and charge these expenses to the Schools' Budget. The LA shall reimburse expenses of members of the Forum when members submit appropriate claims, in connection with attendance at the meetings. Supply cover should only be claimed when it has been necessary to employ a supply cover teacher to enable the Headteacher to attend the Forum.

3.10 Interpretation of the Constitution
The Chair or person presiding at the meeting shall be the final arbiter regarding the interpretation of the Forum's Constitution. The Constitution shall be interpreted in conjunction with the relevant provisions contained in the legislation relating to the Forum's

proceedings. The requirements of legislation will prevail in the event of there being any inconsistency between the legislation and the Constitution.

3.11 Amendment of the Constitution

With the exception of matters subject to legislative provision or approval by the authority, the Forum may vary its Constitution by a simple majority vote by the members provided that prior notice of the nature of the proposed variation is made and included on the agenda for the meeting.

3.12 Publicity relating to the Schools Forum

The Schools Forum is a public meeting, and the LA is responsible for putting the Schools' Forum papers, minutes and decisions promptly on the West Berkshire Council website and generally draw schools attention to forthcoming Schools' Forum meetings and agendas and the minutes of Forum discussions.

D. SUBGROUP OF THE SCHOOLS' FORUM

4.1 The Heads Funding Group

The Heads Funding Group (HFG) is a formal sub-group of the Schools' Forum. Its purpose is to provide strategic input and recommendations on matters relating to school funding, in advance of Schools' Forum meetings. The HFG shall meet prior to Forum meetings, in accordance with a schedule agreed annually, to ensure timely and effective input into the decision-making process.

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West Berkshire Council Schools' Forum Membership

Contact e-mail address for all members: schoolsforum@westberks.gov.uk

School Members:				**Start**	**End**	**Duration**
Nursery Schools	Chloe Summerville	Headteacher	Hungerford Nursery School	Sep-24	Sep-28	4 years
Primary Schools	Keith Harvey	Headteacher	St John and St Nicolas Schools Federation	Jan-26	Jan-30	4 years
	Jo Lagares	Headteacher	The Kite Federation	Jun-23	Jun-27	4 years
	Michelle Harrison	School Business Manager	St Finian's Catholic Primary School	Feb-25	Feb-29	4 years
	Rebecca Hartley	Governor	The Isleys and Hampstead Norreys Federation	Nov-25	Nov-29	4 years
	Brett Melvill-Smith	Governor	Chieveley Primary School	Feb-26	Feb-30	4 years
	Jay Armstrong	Governor	Hungerford Primary School	Mar-24	Mar-28	4 years
	Jo MacArthur	Headteacher	The Willows Primary School	Jun-24	Jun-28	4 years
	Kavash Bamfield	Headteacher	Falkland Primary School	Jun-25	Jun-29	4 years
	Proposed reduction of one seat, subject to Forum approval					
Secondary Schools	David Ramsden	Headteacher	Little Heath School	Sep-22	Sep-26	4 years
	Nicolle Browning	Headteacher	The Willink School	Sep-22	Sep-26	4 years
	vacancy - *to be removed, subject to Forum approval*					
Special Schools (maintained)	Jon Hewitt	Headteacher	The Castle School	Sep-22	Sep-26	4 years
Pupil Referral Units	Jacquie Davies	Headteacher	The Reintegration Service / iCollege	Oct-25	Oct-29	4years
Academies	Julie Lewry	Headteacher	Speenhamland School	Apr-24	Apr-28	4 years
	Steve Lewis	Trustee	Denefield School	Oct-25	Oct-29	4 years
	Charlotte Wilson	Headteacher	Trinity School	Oct-25	Oct-29	4 years
	Edwin Towill	Headteacher	Denefield School	Sep-24	Sep-28	4 years
	David Fitter	Headteacher	St Bartholomew's School	Sep-24	Sep-28	4 years
	Gary Norman	Governor	St Bartholomew's School	Mar-25	Mar-29	4 years
	Catherine Bernie	Headteacher (Academy Special School)	Brookfields School	May-25	May-29	4 years
	Proposed increase of two seats, subject to Forum approval					
Non School Members:						
Non School Post 16 Providers	Lee Probert	Principal and Chief Executive	Newbury College	Jun-26	Jun-30	4 years
Early Years PVI Providers	Melanie Godliman	Business Support Manager	Rocking Horse Nursery	Jun-25	Jun-29	4 years
Church of England Diocese	Reverend Mark Bennet		Diocese of Oxford	Dec-25	Dec-29	4 years
Roman Catholic Diocese	Graham Spellman		Diocese of Portsmouth	Jul-24	Jul-28	4 years
Trade Union	Richard Hand		NEU	Jan-26	Jan-30	4 years
Other Attendees:						
Executive Members:						
	Heather Codling	Portfolio Holder for Children and Family Services				
	Iain Cottingham	Portfolio Holder for Finance and Resources				
LA Officers:						
	Ashley Milum	Service Director - Education and SEND				
	Hine Thompson	Senior Finance Business Partner				
Clerk:						
	Jessica Bailiss	Democratic Services Officer				

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SEND & Joint Commissioning

West Berkshire COUNCIL

What is Commissioning

- Commissioning is understanding the need of a particular service and ensure the right service is designed and developed to deliver the best possible outcome and value for money.
- Ensure the process and structure is established.

- Analyse
- Plan
- Do
- Review

Commissioning

- Commissioning services to provide full transparency, strengthen accountability and deliver improved value for money.
- Commission services based on data and predicted need
- Ensure sufficient local provision (reducing the need of out-of-area placements)
- Aligning education, health and social care funding
- Reducing duplication and inefficiency across services.
- Procurement compliance, with services commissioned in accordance with the council's Contract Procedure Rules.

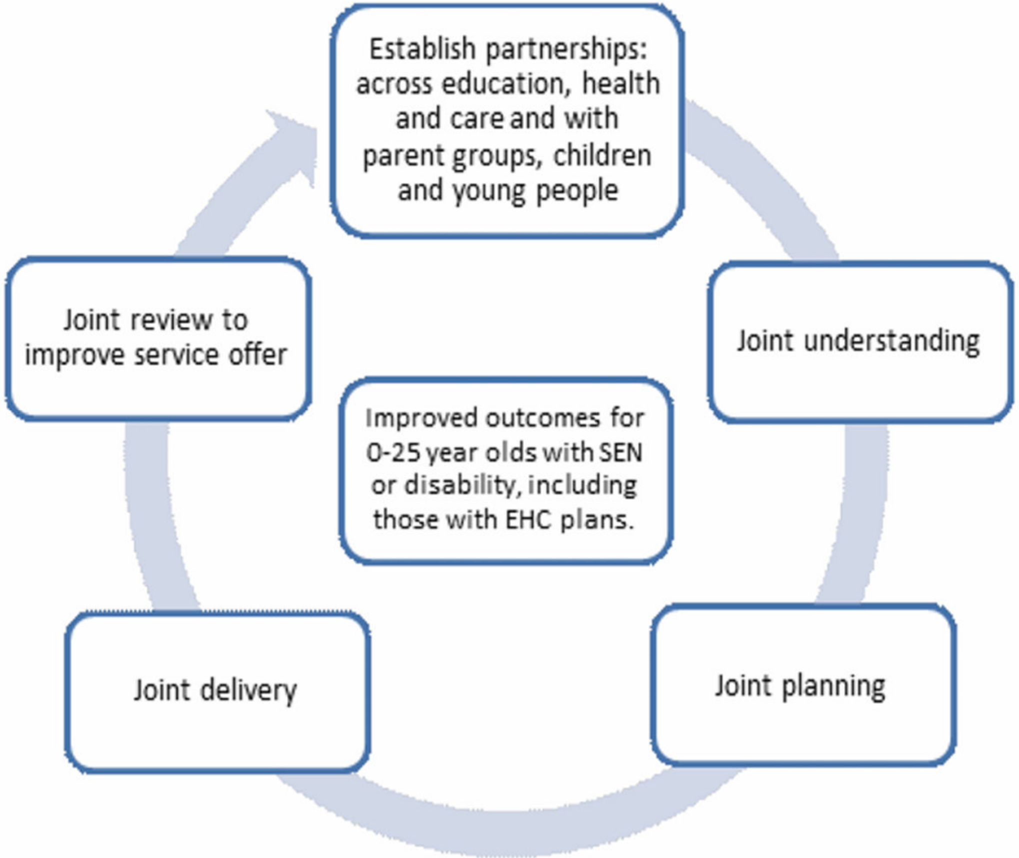
SEND Code of Practice

Local authorities and their partners must develop joint arrangements for commissioning services to improve outcomes for 0 to 25-year-old children and young people.

The five stages on how partners should commission services are:

- establish partnerships: across education, health and care and with parent groups, children and young people
- joint understanding
- joint planning
- joint delivery
- joint review to improve service offer

The joint commissioning cycle



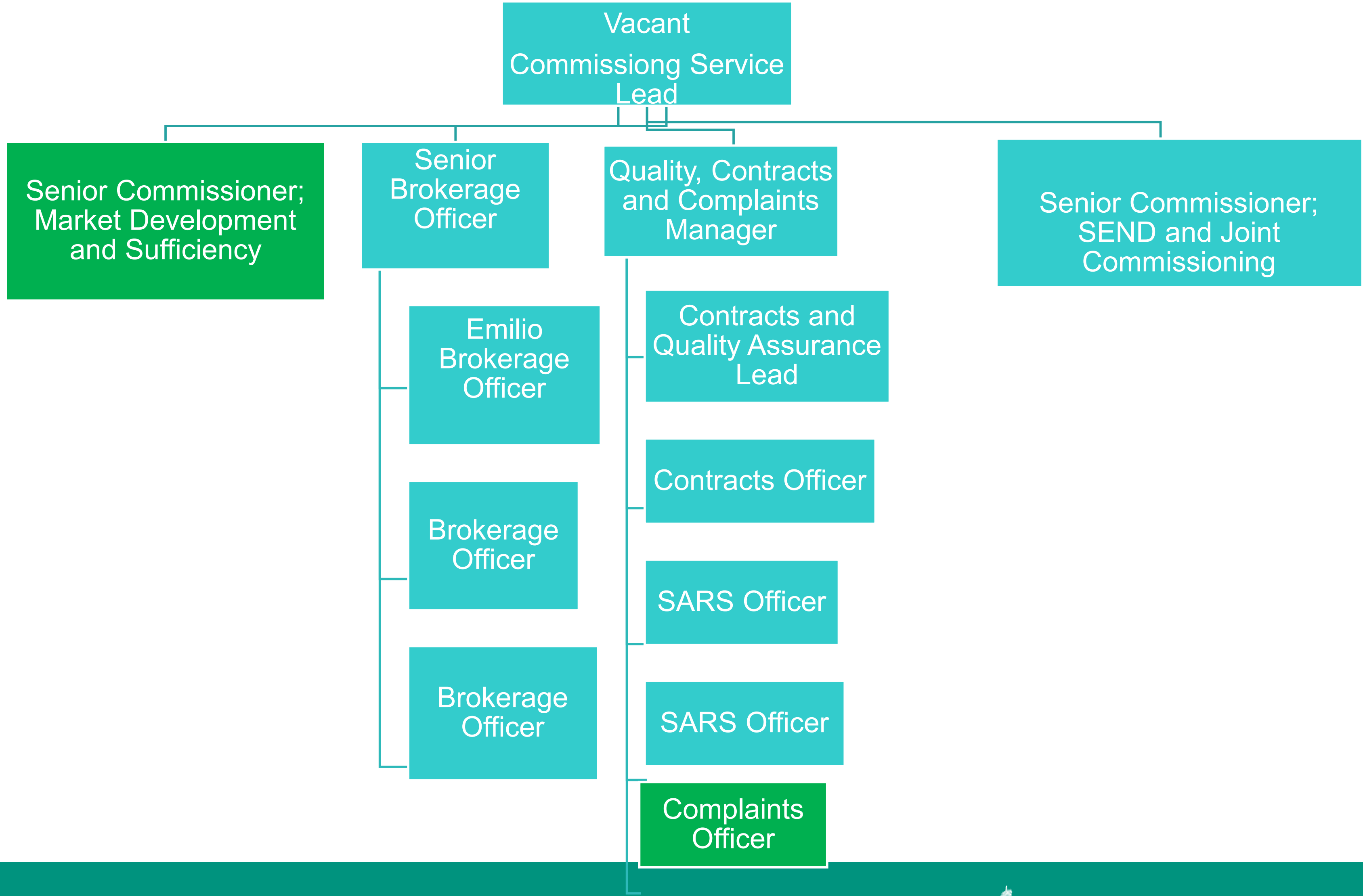
National Expectations

- Joint Commissioning & Local Offer
  - Local Authorities must create a jointly commissioned "Local Offer" that streamlines support across education, health, and social care.
- Inclusion in Mainstream Settings
  - A national shift toward educating more children with SEND in mainstream schools.
- Early Intervention
  - A core focus is on earlier identification and support to reduce the need for last-minute or expensive, distant placements.
- Improved Accountability & Data
  - Implementation of a new national SEND data strategy to track need, provision, and outcomes, which will be integrated into Ofsted inspections.
- Strong joint commissioning arrangements (Children & Families Act 2014)

New Children's Commissioning Team

- A review of Children’s Commissioning arrangements took place during 2024.
- Its was proposed a new commissioning team to be created including:
  - Quality Assurance – responsible for leading on the quality assurance of health and educational settings e.g. children's homes, alternative provision.
  - Contracts & Brokerage – contract management and sourcing placements for children's homes
  - Commissioners – Social Care and SEND Commissioners reporting to Children's Commissioning service lead and SEND commissioner having close collaborative working relationship with the SEND Service Lead.
- The team was established in October 25.

Commissioning Team Structure



West Berkshire COUNCIL

Commissioning Work Priorities

- **Special Educational Needs and Disabilities Information, Advice and Support Service (SENDIASS)** -
  - Service provides free, impartial, advice and support to children, young people with SEND and their parents or carers. E.g. support with navigating through the EHCP pathway.
  - This work will begin in September 2026 with the view to have a new service establish on 1st August 27
- **Resource Base Service Level Agreements (SLA)**
  - SLAs between the West Berkshire Council and schools hosting resource bases, to strengthen and standardise systems, processes, and expectations for resource provision.
- **Children and Young People Integrated Therapies (CYPIT)**
  - Joint commissioned integrated therapies services – currently a review is being carried out by the Thames Valley ICB and three local commissioning areas (Wokingham, Reading and West Berkshire)
- **Short Breaks & Local Offer** – provides children with disabilities opportunities for social activities and development whilst providing families and carers respite and support.
  - This service is currently being designed and working with families and a providers.
  - New service in place by April 27
- **Alternative Provision**
  - Developed an internal guidance document
  - Establish a quality assurance framework for internal West Berkshire education collegues.

Continued…

- **Joint Work Across Local Area and ICB**
  - Integrated / joined-up care across health, education, and social care
  - SEND sufficiency & local provision
  - Co-production & family experience

- **Child and Adolescent Mental Health Service (CAMs)**
  - Joint commissioned service – commissioned jointly with Thames Valley ICB, Wokingham, Reading and West Berkshire.

- **Tellmi – App**
  - Free mental health support including therapy with no wait times or number of sessions. Schools and organisations can also benefit from free resources and workshops.
  - Joint commissioned service – commissioned jointly with Thames Valley ICB, Wokingham, Reading and West Berkshire.

Alternative Provision

- **Guidance & Quality Assurance**
- We are currently developing a comprehensive local guidance document alongside a robust Quality Assurance (QA) framework for Alternative Provision (AP).
- The primary objective is to establish clear, standardised expectations for safety, across all alternative settings West Berkshire works with.
- We will work closely with our education colleagues to ensure that student outcomes are considered as part of the quality review process.

Alternative Provision

- **Commissioning & Procurement Routes**
  - This approach will help us support and explore procurement routes to commission Alternative Provision across the Council.
  - By moving toward a structured procurement model: *examples: an Approved Provider List, Framework or a Dynamic Purchasing System.*

Planned Future Commissioning Workplan

- Supporting the implementation of the SEND Reforms, *Example: Experts at Hand*
- Analyse spending in high-cost areas such as Independent and Non-Maintained Special Schools (INMSS) identify efficiencies and value for money.
- Working to establish a clear structured approach for commissioning of AP
- Support the commissioning of any new resource provision led by West Berkshire Council for schools or colleges

West Berkshire COUNCIL

Questions

- What opportunities do you see for us to work more effectively together to improve outcomes for children and young people with SEND?
- How can we strengthen partnerships between schools, AP providers and West Berkshire?
- What improvements would help to strengthen multi-agency working across services?

Thank You

Senior SEND & Joint Commissioner

Get in touch:

Ash.Hussain2@westberks.gov.uk

Agenda Item 9

Schools: Deficit Balances FY 2025/26

Report being considered by:	Schools' Forum		
Date of Meeting:	13th July 2026		
Report Author:	Kirsty Bray/Edith Cheng		
Item for:	Discussion/Comment	**By:**	All Maintained Schools Representatives

1. Purpose of the Report

1.1 To report on the outturn of the thirteen schools that set a deficit budget for 2025/26.

1.2 To report on two schools closing 2025/26 with an unplanned deficit.

2. Recommendation

2.1 There are no recommendations arising from this report. Its purpose is to provide School Forum members with information on the financial position and outcomes of schools operating with a deficit budget during the 2025/26 financial year.

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 Schools are permitted to set a deficit budget if they meet certain conditions. This is termed a licensed deficit. The conditions of a licensed deficit are set out in para 7.9 of the Scheme for Financing Schools (the legal contract the Council has with schools) and include the following statement, "The recommended length over which schools may repay the deficit, i.e. reach at least a zero balance, with appropriate mechanism to ensure that the deficit is not simply extended indefinitely, is three years".

3.2 This report provides details of fifteen schools that ended 2025/26 with deficits.

Of the fifteen schools ending 2025/26 with deficit balances, ten operated under approved licensed deficit arrangements, three had planned but unlicensed deficits, and two schools reported unplanned deficits at year end.

(1) Planned deficits: Thirteen schools set a planned deficit budget for 2025/26 totalling £1,293,564 deficit. Ten of which were licensed, the remaining three schools' deficits were planned but not licenced due to some financial uncertainty.

(2) Unplanned deficits: Two additional schools, budgeted in surplus, ended the financial year with unplanned deficits on their main school budgets totalling £64,658.

3.3 The total value of the deficit balances on main school budgets at the end of the 2025/26 was £1,385,511 (£1,320,853 planned and £64,658 unplanned).

3.4 If the conditions of a licensed deficit are not met by the school, or if the school has unlicensed/unplanned deficit, the Council has the power to issue a Notice of Concern, which ultimately could mean removal of a school's delegation.

4. Local Authority Approach to Licensed Deficits

4.1 The Council operated a strategy aimed to minimise the number and size of deficits. It is in two parts:

(1) Procedures to support schools to reduce/eliminate or avoid a deficit.

(2) Intervention for schools not meeting their deficit recovery plan.

4.2 Approval of a licenced deficit required the school to complete the following:

(1) Submit monthly budget monitoring reports (M3 and then M6 to M11 inclusive) and supporting documents.

(2) To attend meetings with the local authority when requested to address any budget concerns.

(3) Submit five-year detailed deficit recovery plan.

(4) Take part in:

a) any review the Local Authority commissions on the school's budget deficit position and recovery plan, including a Schools Resource Management Advisor deployment and,

b) the introduction and use of any additional analysis and data tools deemed appropriate including Integrated curriculum and financial planning (ICFP).

5. 2025/26 Outturn Position – Planned Deficit Schools

5.1 Thirteen schools had a Main School Budget (MSB) planned deficit in 2025/26, totalling £1,293,564 deficit. The final outturn position for these schools was £1,320,850 deficit which is £27,286 greater than budgeted. A summary is shown in the table below.

	SCHOOLS/FEDERATIONS WITH PLANNED DEFICITS IN 2025/26 Surplus / (Deficit)	Budget (MSB)	P9 Forecast	Closing Balance 2025/26	Variance Orginal MSB to Closing Balance	Variance P9 Forecast to Closing Balance
		1	2	3	3-1	3-2
1	# Brimpton	(£20,335)	(£4,865)	(£4,662)	£15,673	£203
2	# Chieveley	(£25,647)	(£34,899)	(£64,877)	(£39,230)	(£29,978)
3	Hermitage	(£96,194)	(£132,488)	(£190,567)	(£94,373)	(£58,079)
4	KVPS	(£25,426)	(£33,364)	(£30,519)	(£5,093)	£2,845
5	Pangbourne	(£160,875)	(£160,681)	(£111,155)	£49,720	£49,526
6	Purley	(£39,089)	(£44,281)	(£24,456)	£14,633	£19,825
7	St Finians	(£40,900)	(£43,690)	(£62,952)	(£22,051)	(£19,262)
8	St Joes	(£173,294)	(£190,513)	(£175,149)	(£1,855)	£15,364
9	Spurcroft	(£134,503)	(£131,423)	(£130,215)	£4,288	£1,208
10	The Burghfield Common Federation	(£206,071)	(£94,043)	(£156,150)	£49,921	(£62,107)
11	# The Kite	(£301,743)	(£255,006)	(£260,929)	£40,814	(£5,923)
12	Theale	(£52,547)	(£86,133)	(£101,947)	(£49,400)	(£15,814)
13	Woolhampton	(£16,940)	(£4,191)	(£7,275)	£9,665	(£3,084)
TOTAL		**(£1,293,564)**	**(£1,215,575)**	**(£1,320,850)**	**(£27,288)**	**(£105,276)**

(#) unlicensed deficits

(1) Brimpton (#)

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Brimpton	£11,308	(£30,834)	(£14,162)	(£24,864)	(£4,662)	£20,202

The final outturn position was a £4.6k deficit, which is £15.6k better than the original budgeted deficit of £20.3k.

(2) Chieveley (#)

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Chieveley	£59,104	£75,856	£90,251	£52,760	(£64,877)	(£117,637)

The final outturn position was a £64.8k deficit, which is £39.2k worse than the original budgeted deficit of £25.6k.

(3) Hermitage

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Hermitage	(£7,151)	£1,911	(£13,311)	(£40,499)	(£190,567)	(£150,068)

The final outturn position was a £190.5k deficit, which is £94.3k worse than the original budgeted deficit of £96.2k.

(4) Kennet Valley

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
KVPS	£82,901	£50,592	£3,875	£1,800	(£30,519)	(£32,319)

The final outturn position was a £30.5k deficit, which is £5.1k worse than the original budgeted deficit of £25.4k.

(5) Pangbourne

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Pangbourne	£9,804	£520	(£77,778)	(£88,049)	(£111,155)	(£23,106)

The final outturn position was a £111.1k deficit, which is £49.7k better than the original budgeted deficit of £160.8k.

(6) Purley

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Purley	£64,326	£74,704	£45,390	£14,829	(£24,456)	(£39,285)

The final outturn position was a £24.5k deficit, which is £14.6k better than the original budgeted deficit of £39.1k

(7) St Finians

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
St Finians	**0**	(£33,935)	(£87,161)	(£75,444)	(£62,952)	£12,492

The final outturn position was a £62.9k deficit, which is £22k worse than the original budgeted deficit of £40.9k

(8) St Josephs

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
St Joes	(£7,173)	(£85,585)	(£158,621)	(£182,853)	(£175,149)	£7,704

The final outturn position was a £175.1k deficit, which is £1.8k worse than the original budgeted deficit of £173.3k

(9) Spurcroft

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Spurcroft	(£79,302)	(£138,281)	(£199,639)	(£154,340)	(£130,215)	£24,125

The final outturn position was a £130.2k deficit, which is £4.3k better than the original budgeted deficit of £134.5k

(10) The Burghfield Common Federation

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
The Burghfield Common Federation	£133,145	£189,310	£183,632	£13,171	(£156,150)	(£169,321)

The final outturn position was a £156.2k deficit, which is £49.9k better than the original budgeted deficit of £206.1k

(11) The Kite (#)

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
The Kite	(£37,097)	£73,182	£58,193	(£91,131)	(£260,929)	(£169,798)

The final outturn position was a £260.9k deficit, which is £40.8k better than the original budgeted deficit of £301.7k

(12) Theale

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Theale	£37,384	£8,626	(£39,994)	(£234,747)	(£101,947)	£132,800

The final outturn position was a £101.9k deficit, which is £49.4k worse than the original budgeted deficit of £52.5k

(13) Woolhampton

School Balance History	Main School Budget Balance					Increase / Decrease
	2021/22	2022/23	2023/24	2024/25	2025/26	24/25 to 25/26
	£	£	£	£	£	£
Woolhampton	£23,094	£39,782	(£133)	(£38,500)	(£7,275)	£31,225

The final outturn position was a £7.3k deficit, which is £9.6k better than the original budgeted deficit of £16.9k

6. 2025/26 Outturn Position – Unplanned Deficit Schools

	SCHOOLS/FEDERATIONS WITH UNPLANNED DEFICITS IN 2025/26 Surplus / (Deficit)	Budget (MSB)	P9 Forecast	Closing Balance 2025/26	Variance Orginal MSB to Closing Balance	Variance P9 Forecast to Closing Balance
		1	2	3	3-1	3-2
1	Brightwalton	£1,070	(£25,464)	(£24,731)	(£25,801)	(£1,070)
2	Bucklebury	£2,840	(£11,907)	(£39,927)	(£42,767)	(£2,840)

(1) Brightwalton

The final outturn position was a £25.8k deficit, which is £26.9k worse than the original budgeted surplus of £1.1k

(2) Bucklebury

The final outturn position was a £42.7k deficit, which is £45.5k worse than the original budgeted surplus of £2.8k

7. Consultation and Engagement

Section 151 Officer

Service Director for Education and Special Educational Needs and Disabilities (SEND)

8. Conclusion

This report provides the outturn position for fifteen schools that ended 2025/26 with deficit balances. Thirteen schools entered the year with planned deficit budgets, ten of which had licensed deficits, and two additional schools ended the year with unplanned deficits. The total value of deficit balances on main school budgets at 31 March 2026 was £1.386m.

The report is presented to Schools Forum for information and to support ongoing oversight of schools operating with deficit balances and recovery plans.

9. Appendices

None

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 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 *(Principal Educational Psychologist & SEMH Service Manager)*
	Draft High Needs Budget Proposals 2027/28	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Mollie McQuade/Emma Ferrey
	Early Years Budget 2026/27 - In Year Position	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Mollie McQuade/Kirstie Hanson *(Head of Early Years)*
	Education Budget Monitoring - Quarter 1	15/09/2026	22/09/2026	06/10/2026	12/10/2026	Discussion/Comment	Mollie McQuade/Ashley Milum *(Service Director Education and SEND)*
	DSG Monitoring 2026/27 - Quarter 1			06/10/2026	12/10/2026	Discussion/Comment	Mollie McQuade/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	Mollie McQuade
	Draft Central Schools Block Budget 2027/28	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Discussion/Comment	Mollie McQuade
	High Needs Block Budget Proposals 2027/28	04/11/2026	11/11/2026	01/12/2026	07/12/2026	Discussion/Comment	Mollie McQuade/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	Mollie McQuade/Kirstie Hanson
	Central School Block Budget Proposals 2027/28	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Decision	Mollie McQuade
	Final DSG Funding Settlement Overview 2027/28	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Mollie McQuade
	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	Mollie McQuade/Emma Ferrey
	Education Budget Monitoring - Quarter 2	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Mollie McQuade/Ashley Milum
	DSG Monitoring 2026/27 - Quarter 3			12/01/2027	18/01/2027	Discussion/Comment	Mollie McQuade/Ashley Milum
	Deficit Schools	16/12/2026	06/01/2027	12/01/2027	18/01/2027	Discussion/Comment	Edith Cheng

Please note that items may be moved or added as required.

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