# DRAFT

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

# SCHOOLS FORUM

# MINUTES OF THE MEETING HELD ON MONDAY 12 OCTOBER 2026

**Present**: Jay Armstrong (Maintained Primary Schools), Reverend Mark Bennet (Church of England Diocese), Catherine Bernie (Academy Special Schools), Nicolle Browning (Maintained Secondary Schools), Libby Bucknell (Maintained Primary Schools), Councillor Heather Codling (Deputy Leader & Executive Portfolio Holder: Children and Family Services), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), David Fitter (Academy Schools), Mel Godliman (Early Years PVI Settings), Richard Hand (Trade Union), Michelle Harrison (Maintained Primary Schools), Rebecca Hartley (Maintained Primary Schools), Keith Harvey (Maintained Primary Schools), Steve Lewis (Academy Schools), Jo MacArthur (Maintained Primary Schools), Brett Melvill-Smith (Maintained Primary Schools), Gary Norman (Academy Schools), Chris Prosser (Academy Schools), Chloe Summerville (Maintained Nursery Schools) and Paul Vanwalwyk (Maintained Special Schools)

**Also Present:** Toby Bradley (Service Lead, Financial Management), Edith Cheng (Finance Manager), Emma Ferrey (Service Lead SEND), Kirstie Hanson (Head of Early Years), Mollie McQuade (Finance Business Partner for DSG), Ashley Milum (Service Director for Education and SEND) and Jessica Bailiss (Democratic Services Officer)

**Apologies for inability to attend the meeting:** Charlotte Badarello, Lee Probert, David Ramsden, Graham Spellman and Hine Thompson

*Keith Harvey (Vice Chair) in the Chair*

## PART I

### 1 Minutes of previous meeting dated 13th July 2026

The minutes of the meeting held on 13th July 2026 were approved as a true and correct record and signed by the Vice-Chair.

### 2 Actions arising from previous meetings

It was noted that there were no outstanding actions from previous meetings.

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

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

### 4 Declarations of Interest

There were no declarations of interest received.

### 5 Membership

Jess Bailiss reported that since the last meeting in July, Chris Prosser and Charlotte Bardarello had been appointed as academy headteacher representatives on the Schools' Forum and Heads' Funding Group.

Consultation was underway with primary academies to fill the remaining academy vacancies and an election process for academy governor representatives would take place shortly.

It was noted that Lee Probert had joined the Forum as the new non-school post 16 representative. Paul Vanwalwyk had been appointed as the maintained special school representative and Libby Bucknell had become a full maintained primary school representative.

David Ramsden and Nicolle Browning had also confirmed their willingness to continue as Maintained Secondary School representatives for a further four-year term.

## 6 Schools Funding Formula Consultation 2027/28 (Mollie McQuade)

Mollie McQuade introduced the report (Agenda Item 7), which sought approval to consult with schools on the proposed approach to the 2027/28 Schools Funding Formula. The recommendation from the Heads' Funding Group (HFG) was that the Schools' Forum approve the consultation with schools on the areas set out in section two of the report. It was noted that the consultation would run from 14th October to 6th November 2026.

Brett Melville-Smith acknowledged the pressures within the High Needs Block (HNB) but queried the proposal to consult on transferring up to 0.5% from the Schools Block at a time when a number of maintained schools were operating with budget deficits. He asked whether the benefits to mainstream schools could be demonstrated, including what proportion of funding would be returned to schools, the outcomes that would be achieved and the implications if no transfer took place. Ashley Milum responded that there was no straightforward way of demonstrating this. He acknowledged the pressures facing both the HNB and individual school budgets. He advised that the proposed transfer was being presented as an option for consideration rather than a recommendation and noted that schools would have the opportunity to comment through the consultation process.

Michelle Harrison referred to discussion at the HFG and sought confirmation that additional information on the HNB and the benefits of any proposed transfer would be included within the consultation documentation. Mollie McQuade confirmed that further information had been included, setting out the main pressures within the High Needs Block, particularly Independent Non-Maintained placements and top-up funding. She added that the information would also explain how any transfer would support the transition funding agreed for Year 7 pupils with SEND.

Rebecca Hartley noted limited understanding of notional SEN funding and suggested that the consultation documentation should include a comparison between the West Berkshire and national percentages, as this would provide useful context for schools. She also sought reassurance that Growth Funding would not be used to support school growth where there were nearby schools with surplus places that could be adversely affected. Mollie McQuade advised that no schools were currently expected to apply for Growth Funding. It was agreed that information on notional SEN percentages could be included in the consultation document.

The Vice Chair invited Ashley Milum to provide an update on the SEND Reform Plan. Ashley Milum advised that the Department for Education (DfE) had deferred approval of the Council's plan and that further work was required before it could be resubmitted. He reported that discussions with the DfE were ongoing and that further engagement would take place with schools and other stakeholders ahead of the plan being resubmitted by the end of November 2026.

The Vice Chair proposed that the Forum consider Agenda Item 8, which detailed the proposed de-delegations for 2027/28, before returning to the recommendations set out in section 2 of the report.

*(Following consideration of Agenda Item 8)*

The Vice Chair invited the Forum to consider the recommendation set out in section two of the report that the consultation be undertaken with all schools between the 14th October 2026 to 6th November 2026 on the following areas:

1. Continuing to mirror the NFF as closely as possible.
2. Possible transfer of up to 0.5% of Schools Block funding to support High Needs pressures.
3. The proposed criteria for allocating Growth Funding.
4. The proposed criteria for allocating the Additional High Needs Fund.
5. Proposed de-delegated services for maintained schools.
6. The methodology used to calculate schools' Notional SEN Budgets.

The recommendation was proposed and seconded and at the vote the motion was approved.

**RESOLVED that:**

- Officers would consider including a comparison between the West Berkshire and national notional SEN percentages within the consultation documentation to provide additional context for schools.
- The Schools' Forum agreed the recommendation in the report and the information would go out for consultation with schools from 14th October 2026 to 6th November 2026.

## 7 Draft De-delegations 2027/28 (Mollie McQuade)

Mollie McQuade introduced the report, which set out the proposed de-delegated services and expected costs for 2027/28. It was noted that de-delegation applied to maintained primary and secondary schools and that, where de-delegation had been agreed, the Local Authority would offer the services to maintained special schools, nursery schools, PRUs and academies on a buyback basis.

Jo MacArthur was of the understanding that it had previously been agreed that further information on the value for money and impact of de-delegated services would be provided. She noted that it had historically been clear what the services aimed to provide but clarified that her query related to the impact of the services and how this was measured, rather than the services provided. The Vice Chair recalled previous discussion on the matter but noted that there had been significant changes in officers since it had been raised. Ashley Milum acknowledged that the matter had not been picked up and agreed that there needed to be a greater understanding of the issue. He advised that officers would review the position and include this as part of regular reporting on de-delegations going forward.

**RESOLVED that** information on the impact and value for money of de-delegated services be included as part of future de-delegation reporting to the Schools' Forum.

## 8 DSG Briefing Note (Mollie McQuade)

Mollie McQuade introduced the briefing note (Agenda Item 9), which had been prepared in response to a query raised by Councillor Ross Mackinnon at a meeting of the Executive on 22 June 2026. It was reported that the purpose of the note was to clarify the matter raised and confirm that there had been no financial impact on the Dedicated Schools Grant balance as a result.

**RESOLVED that** the Schools Forum noted the briefing note.

## 9 Early Years Budget 2026/27 - In Year Position (Kirstie Hanson/Mollie McQuade)

Mollie McQuade introduced the report (Agenda Item 10) and advised that the Early Years Block was forecasting a surplus position following confirmation of the post year-end adjustment from the Department for Education.

Jo MacArthur acknowledged the reasons given for the Early Years Funding Group no longer operating but expressed concern that specialist Early Years funding issues were no longer considered through a dedicated forum. She noted that the group had brought together representatives from maintained schools and private, voluntary and independent settings and felt it had provided valuable expertise to support funding discussions and decisions.

Reverend Mark Bennett recalled that the Early Years Funding Group had originally been established to help the Forum better understand the particular pressures facing Early Years funding. He considered that, given the specialist nature of these issues, there remained a need for a mechanism through which the Forum could receive information on these specialist aspects.

Ashley Milum acknowledged the concerns raised. He advised that officers were reviewing whether the current sub-committee arrangements supporting the Schools' Forum remained appropriate and would bring forward proposals on potential future sub-committee arrangements for consideration by the Schools' Forum. The Vice Chair supported this approach.

**RESOLVED that** Officers prepare proposals on potential future sub-committee arrangements for consideration by the Schools' Forum.

## 10 Vulnerable Children's Grant - Annual Report for 2025/26 (Melissa Perry)

Melissa Perry introduced the report (Agenda Item 11) and explained that Schools' Forum had previously agreed to combine a number of funding streams into a single Early Support Intervention Funding arrangement. She advised that changes had subsequently been made to strengthen governance and accountability arrangements, improve the application process and support more effective monitoring of outcomes and impact.

The Vice Chair drew attention to questions submitted in advance of the meeting by Mr Matthews and invited Melissa Perry to respond.

Melissa Perry advised that questions had been raised regarding a discrepancy between the number of applications received and those reported on within the report. She explained that further analysis had since been undertaken and confirmed that 38 applications had been received, of which 34 had been approved. Of the approved applications, 28 related to pupils with Social, Emotional and Mental Health (SEMH) needs, five related to pupils with learning needs and one related to a pupil with medical needs.

Melissa Perry explained that funding remaining at the end of the financial year had been returned to the High Needs Block. She noted that this did not indicate that applications were being refused but instead suggested that schools had not fully utilised the funding available. She reported that feedback from schools had identified difficulties navigating a number of separate funding streams and application processes. One of the reasons for establishing the single Early Support Intervention Funding arrangement was therefore to provide a clearer and more streamlined application process.

Melissa Perry acknowledged that historic reporting arrangements for the Vulnerable Children's Grant had not provided sufficient information on outcomes and impact. She advised that the revised arrangements had been designed to improve transparency and ensure that future reporting provided clearer information regarding expenditure, activity and outcomes.

Melissa Perry also responded to a question regarding the overall value of the combined funding arrangements. She advised that a typographical error within the report had led to confusion regarding the total funding available and confirmed that the combined funding allocation was £276,040.

In response to a further query regarding pupils with Education, Health and Care Plans (EHCPs), Melissa Perry explained that the funding was intended primarily as an early intervention mechanism. Where an EHCP was already in place, or an Education, Health and Care Needs Assessment had progressed to a formal statutory process, support would generally be provided through existing statutory funding routes. However, schools could still apply for funding relating to group work, whole-school approaches and interventions aimed at preventing permanent exclusion.

Melissa Perry welcomed the scrutiny provided through the questions submitted and agreed that there was a need for greater transparency regarding expenditure, activity and outcomes. She expressed confidence that the revised arrangements would enable more robust reporting in future.

Brett Melville-Smith sought clarification on the average timescale between submission of an application and a decision being made. He also enquired what evidence was available to demonstrate whether funded interventions had prevented exclusions or maintained placements.

Melissa Perry acknowledged that historically there had not been sufficient evidence available to demonstrate outcomes. She advised that under the Early Support Intervention Funding arrangements, applications were linked to specific outcomes and schools were required to provide feedback on the impact achieved. She explained that this would provide a stronger evidence base for future reporting and enable officers to assess whether the funding was achieving its intended outcomes. Melissa Perry advised that funding decisions were typically made within two weeks of an application being received.

Chris Prosser noted that a key benefit of the previous Vulnerable Children's Grant arrangements had been the speed of decision making and welcomed confirmation that this remained the case. Melissa Perry added that applications relating to the prevention of permanent exclusion were considered on a case-by-case basis and could be dealt with almost immediately, outside of the normal funding panel process.

The Vice Chair requested that the responses provided to Mr Matthews' questions be captured in the minutes and provided to Mr Matthews following the meeting.

**RESOLVED that** a response be provided to Mr Matthews setting out the officer responses to the questions raised and the discussion held by the Schools' Forum.

## 11 Education Budget Monitoring - Quarter 1 (Mollie McQuade)

Mollie McQuade introduced the report (Agenda Item 12) and advised that, at Quarter 1, the Education Service was forecasting an adverse variance of £1.8m against a net expenditure budget of £11.27m. It was noted that the majority of the overspend related to Home to School Transport, investment in School Improvement and lower traded service income than budgeted.

Brett Melville-Smith queried whether commissioning decisions took account of the total cost of SEND provision across education, transport and specialist placements, noting that a placement that appeared cost effective in one area could increase costs in another.

Ashley Milum advised that a new commissioning team had recently been established within Children's Services, including dedicated SEND commissioning capacity. He explained that work was underway to better understand expenditure and value for money across SEND provision, transport and specialist placements, as well as opportunities for joint commissioning with health partners. He noted that officers were still working through these areas and hoped to be in a better position to answer the question by the same time the following year.

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

## 12 DSG Monitoring 2026/27 - Quarter 1 (Mollie McQuade)

Mollie McQuade introduced the report (Agenda Item 13) and advised that the Dedicated Schools Grant remained in deficit, with continued pressures across the High Needs Block, particularly in relation to Education, Health and Care Plan top-up funding and Independent Non-Maintained Special School placements.

The Vice Chair queried whether, given the increasing national focus on SEND expenditure, there was any indication that central government was considering measures to control costs within Independent Non-Maintained Special Schools.

Ashley Milum advised that he was not aware of any plans to introduce controls on costs within Independent Non-Maintained Special Schools and did not anticipate this changing in the near future. He further explained that expenditure in this area could be difficult to predict as tribunal decisions often determined the provision required through an EHCP. He noted that increasing tribunal activity was contributing to financial pressures and reinforced the importance of the commissioning work currently underway.

Paul Vanwalwyk queried whether there were mechanisms in place to monitor whether Independent Non-Maintained Special Schools were providing the level of service expected where placements had been directed through tribunal. He noted that, if the required provision was not being delivered, this could raise questions regarding value for money. Ashley Milum agreed that this was an important consideration. He advised that, alongside work relating to safeguarding practice, the commissioning team was also considering quality assurance arrangements. He noted that the Local Authority currently had limited quality assurance capacity and hoped this could be strengthened through the budget setting process. He added that increasing demand for specialist provision further reinforced the need for quality assurance.

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

## 13 Deficit Schools (Mollie McQuade)

Mollie McQuade introduced the report (Agenda Item 14) and advised that 17 maintained schools were currently budgeting for a deficit position, with a combined deficit of £1.7m.

Brett Melville-Smith referred to previous discussion regarding the relationship between school deficits, surplus places and pupil numbers across West Berkshire. He queried the extent to which the number of schools in deficit reflected individual school budget management, as opposed to wider structural issues arising from surplus school places. Ashley Milum advised that there was some correlation between surplus places and financial pressures, but the relationship was not straightforward. He noted that some schools with surplus places remained financially sustainable, whilst others without significant surplus places were experiencing budget deficits. He explained that officers

were working with schools to ensure expenditure was as effective and efficient as possible, including the use of Integrated Curriculum and Financial Planning tools to benchmark spending and support financial planning.

Councillor Heather Codling added that feedback received through the recent consultation process was still being reviewed and that a response would be provided in due course. She recognised the significant financial pressures facing schools and agreed that schools experiencing financial difficulties were not always those with lower numbers of pupils. She noted that, whilst surplus places formed part of the picture, some solutions could involve measures such as reducing Published Admission Numbers (PAN). She added that uncertainty surrounding local government reorganisation further complicated the position and that further information would be brought back once available.

Jo MacArthur referred to the factors affecting deficit recovery identified within the report and queried what support was available to schools and headteachers to address these issues and what action was taken where deficits arose for these reasons. Ashley Milum advised that officers had been considering this issue and recognised that there was an opportunity to provide greater support to schools approaching a deficit position. Mollie McQuade added that the Finance Team was reviewing its processes for managing deficit budgets, including escalation arrangements and regular monitoring of deficit positions. She advised that officers were working with schools to identify opportunities for improvement and that this work would be aligned with wider school improvement and school sufficiency processes.

Jo MacArthur commented that there was also an opportunity to learn from schools which had remained financially sustainable, including those with surplus places. She suggested that good practice should be identified and shared to support schools before they reached a deficit position.

Rebecca Hartley sought assurance that sufficient capacity existed within the Finance Team to support schools in deficit, noting that the officer previously responsible for this work had left the authority and expressing concern about the support currently available to schools. Mollie McQuade advised that recruitment to the vacant post was underway and that a revised deficit management process was being developed to strengthen budget monitoring, recovery planning and escalation arrangements.

Rebecca Hartley acknowledged the proposed process but remained concerned about the current capacity within the team to deliver that support. Rebecca Hartley further queried whether there was any emerging national direction regarding options such as school closures, federation or academisation in response to increasing numbers of schools forecasting budget deficits. Ashley Milum advised that he was not aware of any national direction on this issue. He explained that officers intended to continue discussions with schools through cluster arrangements and explore opportunities to share learning and best practice across the area. He noted that discussions with governors had included consideration of options such as federation where appropriate and that the Local Authority's (LA) role was largely one of facilitating local conversations. Ashley Milum added that officers were also engaging with other local authorities facing similar pressures to understand how they were responding to these challenges. It was acknowledged that there was no straightforward solution.

Reverend Mark Bennett expressed concern about the capacity available to support schools facing financial pressures. He queried what work was being undertaken to identify schools at risk of deficit in future and suggested that schools may require additional support when considering measures such as reducing PAN or merging classes. He also queried whether financial pressures were having an impact on work to support disadvantaged pupils. Mollie McQuade advised that officers were reviewing historical trends to identify schools that may be at risk of falling into deficit. Ashley Milum

advised that the encouragement to schools was to take decisions before reaching a deficit position and noted that measures such as reducing PAN and reorganising classes, whilst difficult, may need to be considered. He explained that such decisions rested with schools and governors supported by information available to them, with the Local Authority providing checks and balances and support where required.

In relation to disadvantaged pupils, Ashley Milum advised that outcomes for disadvantaged learners remained a local concern. He reported that an audit programme was underway to review the use of Pupil Premium funding across a sample of schools and assess whether funding was being used effectively to support disadvantaged pupils.

Gary Norman suggested that future reports include additional contextual information alongside the deficit figures, such as school size and pupil characteristics, to assist Schools' Forum in understanding and comparing the data presented. Mollie McQuade agreed that this information could be included in future reports.

Brett Melville-Smith queried the expectation placed on schools that were unable to achieve a balanced budget within the three-year recovery period, despite having already reduced expenditure as far as reasonably possible. He also sought clarification on the Council's longer-term strategy for school place planning and financial sustainability and queried when Schools' Forum would have an opportunity to scrutinise this work. Ashley Milum advised that the Scheme for Financing Schools set out the expectations regarding recovery plans. He explained that where a school reached the point at which recovery was no longer considered achievable, a decision point would be reached and officers would make recommendations for political consideration as part of the wider work relating to school place planning.

Councillor Heather Codling advised that work on the strategy was ongoing and would consider school sufficiency across both maintained schools and academies. She noted that the LA was working as quickly as possible to develop the strategy but emphasised that the matter was complex. Councillor Codling commented that decisions regarding school sustainability were not straightforward and that it was not simply a case of identifying individual schools for closure.

Brett Melville-Smith acknowledged the sensitivities involved but expressed concern that delaying difficult decisions could have implications for educational outcomes. Councillor Codling agreed that children should remain at the heart of decision making. She acknowledged the desire to progress the work as quickly as possible but noted that such matters could take time to work through.

Councillor Iain Cottingham agreed that the primary consideration should be what was best for children and young people in West Berkshire and their outcomes. He noted that decisions regarding school sustainability were not straightforward and that wider factors, including demographic changes, future housing growth and the importance of rural communities, would need to be considered. He added that any decisions regarding school closures would have significant long-term consequences and therefore required careful consideration.

Chris Prosser commented that he had been encouraged by the small schools consultation, which had set out a clear way forward. He felt it would be helpful for schools to have greater clarity on the timescales for the next stages of the process, given the uncertainty facing small schools. Councillor Codling advised that work was continuing and that officers were working to progress the next stages. However, she explained that she was not currently in a position to provide a timetable for implementation.

Chris Prosser queried whether further information could be brought to the next Schools' Forum meeting. Councillor Codling advised that she would seek to provide an update as soon as possible but could not guarantee that it would be available for the next meeting.

The Vice Chair noted that public discussion of individual schools could have unintended consequences, particularly where concerns regarding a school's future might influence parental decisions. Councillor Codling agreed and explained that identifying individual schools publicly could have a detrimental impact, even where no decision had been made. Chris Prosser clarified that he was not seeking information on individual schools, but rather greater clarity regarding the overall process and anticipated timescales. He stressed that schools needed certainty and therefore felt it would be helpful if this information could be provided in time for the next Forum meeting. Councillor Codling noted the points raised.

**RESOLVED that**

- Future deficit school reports include additional contextual information, where available, to assist Schools' Forum in considering the data.
- Further information on the next stages of the small schools work and anticipated timescales be provided to Schools' Forum when available.

## 14 Forward Plan

The Schools' Forum noted the forward plan.

## 15 Date of the next meeting

It was noted that there was no preference regarding whether the meeting in December should be held in person or virtually. It was therefore agreed that the meeting on 7 December 2026 would be held virtually via Zoom.

*(The meeting commenced at 5.00 pm and closed at 6.20 pm)*

**CHAIR** …….

**Date of Signature** …….