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 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 …………………………………………….