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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 13 JULY 2026

Present: Jay Armstrong (Maintained Primary Schools), Catherine Bernie (Academy Special Schools), Nicolle Browning (Maintained Secondary Schools), Councillor Heather Codling (Deputy Leader & Executive Portfolio Holder: Children and Family Services), Councillor Iain Cottingham (Executive Portfolio Holder: Finance and Resources), Jacquie Davies (Pupil Referral Unit), Mel Godliman (Early Years PVI Settings), Michelle Harrison (Maintained Primary Schools), Rebecca Hartley (Maintained Primary Schools), Keith Harvey (Maintained Primary Schools), Jo MacArthur (Maintained Primary Schools), Brett Melvill-Smith (Maintained Primary Schools), David Ramsden (Maintained Secondary Schools), Graham Spellman ((Chair) Roman Catholic Diocese) and Chloe Summerville (Maintained Nursery Schools)

Also Present: Edith Cheng (Finance Manager), Mollie McQuade (Finance Manager), Ashley Milum (Service Director for Education and SEND), Ash Hussain (Senior SEND Commissioner) and Jessica Bailiss (Democratic Services Officer)

Apologies for inability to attend the meeting: Kavash Bamfield (Maintained Primary Schools), Reverend Mark Bennet (Church of England Diocese), AnnMarie Dodds (Executive Director - Children & Family Services), Emma Ferrey (Interim Service Manager of SEND), Edwin Towill (Academy Schools), David Fitter (Academy Special Schools), Richard Hand (Trade Union), Kirstie Hanson (Principal Adviser Early Years), Jo Lagares (Maintained Primary Schools), Steve Lewis (Academy Special Schools), Julie Lewry (Academy Special Schools), Hine Thompson (Senior Finance Business Partner) and Charlotte Wilson (Academy Special Schools)

PART I

1 Minutes of previous meeting dated 15th June 2026

The Minutes of the meeting held on 15th June 2026 were approved as a true and correct record and signed by the Chair.

2 Actions arising from previous meetings

There were no actions from previous meetings.

3 Declarations of Interest

Jon Hewitt, Jacquie Davies, Chloe Summerville and Brett Melvill-Smith declared interests in Agenda Item five and withdrew from the meeting for the duration of the item.

4 Surplus Balances and School Balance Statements (Edith Cheng)

(Jon Hewitt, Jacquie Davies, Chloe Summerville and Brett Melvill-Smith left the meeting at 5.10pm)

Edith Cheng introduced the report (Agenda Item 5), which detailed the annual review of maintained schools holding surplus balances in accordance with the Scheme for Financing Schools. It was reported that the scheme allowed for the clawback of uncommitted revenue balances where these exceeded 10% of a school's budget share, subject to a minimum retained balance of £50k.

Edith Cheng advised that all schools identified as holding surplus balances had been invited to submit balance statements setting out the purpose of their reserves. The Local Authority had reviewed these statements alongside supporting information, including Consistent Financial Reporting (CFR) returns, and had considered the ongoing financial position of the schools concerned. It was further reported that the Heads' Funding Group had considered the submissions and recommended that no clawback be applied for the current year. No questions or comments were raised by members on the report.

The Chair drew attention to the recommendation that no clawback be applied to the schools identified within the appendices. The recommendation was proposed and seconded and at the vote with maintained school members, the motion was carried.

RESOLVED that the Schools' Forum approved the recommendation that no clawback be applied to the schools included within the appendices to the report on surplus school balances.

(Jon Hewitt, Jacquie Davies, Chloe Summerville and Brett Melvill-Smith rejoined the meeting at 5.20pm)

5 Scheme for Financing Schools 2026/27 (Edith Cheng)

Edith Cheng introduced the report (Agenda Item 6), which sought approval to adopt the updated Scheme for Financing Schools following consultation with maintained schools. It was noted that the scheme had been reviewed following publication of updated Department for Education (DfE) guidance and that consultation had taken place with maintained schools between 16 and 26 June 2026. Eleven responses had been received, with one school supporting the proposals and ten schools raising concerns regarding aspects of the amendments. Following consideration of the responses, the Local Authority (LA) recommended that the proposed amendments remain unchanged.

Brett Melvill-Smith referred to concerns raised during the consultation regarding Period Three (P3) monitoring. He commented that key information, including budgets and pay awards, was often unavailable at that stage of the financial year and queried whether consideration had been given to returning to the previous Period 6 and Period 9 reporting arrangements. Edith Cheng advised that earlier monitoring would provide a better indication of a school's financial position and any emerging concerns. Brett Melvill-Smith questioned the value of requiring schools to complete detailed reports when forecasts were subject to significant uncertainty.

Ashley Milum acknowledged that P3 reporting would inevitably contain a degree of uncertainty. However, he explained that the intention was to facilitate earlier discussions with schools and enable appropriate support and challenge where concerns were identified. He added that information submitted at P3 would be considered in the context of the known uncertainties present at that stage of the financial year.

Rebecca Hartley expressed concern that some schools had chosen not to respond to the consultation because they felt nothing would change. She suggested that if comments were not taken into account this could discourage engagement in future consultations. Rebecca Hartley also questioned whether sufficient capacity existed within the finance team to manage the additional monitoring requirements and provide appropriate support to schools experiencing financial difficulty, or whether there were plans to increase capacity within the team.

Ashley Milum acknowledged these concerns and emphasised the importance of considering the consultation feedback carefully. He explained that the proposed changes

were intended to align local arrangements more closely with DfE expectations and would support benchmarking through Integrated Curriculum and Financial Planning, and other DfE support mechanisms. He noted that a significantly higher proportion of maintained schools in West Berkshire were operating in deficit when compared to national figures and therefore there was a need to consider the issue carefully and take appropriate action. He added that due regard should be given to the consultation responses and that members would need to consider whether any amendments to the recommendations were required.

In response to Rebecca Hartley's concerns regarding capacity, Ashley Milum advised that discussions were already taking place as part of budget planning for the next financial year and consideration was being given to how schools in, or approaching, deficit could be supported. He explained that the scheme would provide a framework through which support and challenge could be delivered and acknowledged that this had previously been lacking. Ashley Milum added that any arrangements would need to be implemented in a sensible and pragmatic manner, particularly for schools already operating in deficit and confirmed that further engagement with schools and governing boards was planned from September 2026.

Rebecca Hartley queried whether implementation should be delayed until additional capacity was in place. Ashley Milum advised that this was a matter for the Forum to consider and noted that members could support the proposals, request amendments, or seek transitional arrangements.

Brett Melvill-Smith also referred to concerns raised during the consultation regarding the proposal to reduce deficit recovery plans from five years to three years. He commented that some schools remained vulnerable to fluctuations in pupil numbers and could find returning to a balanced position within three years particularly challenging.

Ashley Milum acknowledged the concerns raised and explained that the proposed three-year recovery period aligned with DfE expectations. He reiterated that a higher proportion of maintained schools in West Berkshire were operating in deficit compared to the national position and suggested that the Forum needed to consider how it wished to respond to this. Ashley Milum advised that conversations would be required with individual schools, particularly those already operating in deficit, regarding how their position would continue to be managed. He added that aligning with DfE expectations would be helpful and could provide greater impetus for schools to progress towards a more sustainable financial position. He further noted that additional support and resources would enable a more comprehensive approach to supporting and challenging schools and would help the Forum address this issue going forward.

Brett Melvill-Smith suggested that additional analysis might be required to understand the relationship between school deficits and surplus places and queried whether comparisons with national figures took account of factors such as school closures elsewhere. Ashley Milum acknowledged that this was a fair consideration and advised that further work could be undertaken to explore the issue. It was noted that there was not always a direct correlation between deficit budgets and surplus school places.

Keith Harvey commented that he would be more comfortable delaying implementation until the necessary staffing capacity was in place, although he recognised the need to move towards DfE expectations and suggested that this could provide schools with additional notice of the proposed changes.

David Ramsden commented that, given the current financial context, aligning with DfE expectations was important. Whilst recognising the challenges faced by schools, he suggested that a five-year recovery period could give the impression that insufficient

action was being taken to address deficits and expressed support for the LA's proposed approach.

The Chair thanked members for their contributions and noted the constructive discussion that had taken place. The recommendations were proposed and seconded and at the vote with maintained school members, the motion was carried.

RESOLVED that the Schools' Forum approved the proposed amendments and agreed to adopt and publish the updated Scheme for Financing Schools.

6 Schools' Forum Membership and Constitution from September 2026 (Jess Bailiss)

Jess Bailiss introduced the report (Agenda Item 7), which presented the annual review of the Schools' Forum Constitution and membership arrangements to ensure that representation remained broadly proportionate to pupil numbers across the education sectors represented on the Forum.

A proposed change to the membership arrangements reflected an increase in academy pupil numbers by slightly reducing primary and secondary school representation and increasing academy representation, whilst keeping the overall size of the Forum the same. The report also included a small amendment to the attendance provisions, moving from a six-month rule to a three-meeting rule to better reflect the current meeting cycle.

David Ramsden noted that the rationale for the proposed changes was clear and queried what the changes would mean in practice for current membership arrangements. Jess Bailiss explained that the reduction of one maintained primary representative and one maintained secondary representative, together with the addition of two academy representatives, would be implemented through natural turnover. Vacancies would be managed as they arose and current members would not be asked to step down. She added that the regulations required representation to remain broadly proportionate and that implementing the changes through vacancies was considered the fairest approach. David Ramsden welcomed the clarification.

The Chair drew members' attention to the recommendations set out in Section 2 of the report and invited the Forum to consider the proposed Constitution and membership arrangements for 2026/27. The recommendations were proposed and seconded and, at the vote of all Forum members, the motion was carried. *Jay Armstrong voted against the recommendation and subsequently requested that his reason for doing so be recorded. He advised that he believed a wider discussion was required regarding the impact of academisation on the education system and the implications for support and resources across the authority before changes to representation were approved.*

RESOLVED that the Schools' Forum approved the revised membership and Constitution from September 2026 as set out in the report.

(Nicolle Browning provided apologies and left the meeting at 5.42pm)

7 SEND Commissioning and Efficiency Planning (Ash Hussain)

Ash Hussain, Senior SEND Commissioner, provided an overview of the commissioning function within West Berkshire including its role in assessing need, planning and procuring services, and reviewing outcomes for children and young people. He explained that the commissioning approach sought to ensure services were needs-led, provided value for money and supported improved outcomes through partnership working with education, health and social care.

Ash Hussain outlined the structure of the commissioning team and highlighted a number of current priorities including the recommissioning of the SEND Information, Advice and Support Service (SENDIASS), review of Resource Base Service Level Agreements, development of the Short Breaks Offer and work relating to Alternative Provision (AP). He also provided an update on plans to strengthen quality assurance arrangements and support future SEND reforms.

The Forum noted the presentation and was invited to comment on opportunities to strengthen partnership working and improve outcomes for children and young people with SEND.

Brett Melvill-Smith welcomed the presentation and queried whether schools would be involved in the development of future alternative provision arrangements. Ash Hussain advised that the work was currently at an early stage and that officers intended to work closely with schools as proposals developed. He explained that initial work was focused on gathering information regarding current usage, demand and existing provision in order to inform future commissioning decisions.

Brett Melvill-Smith noted that the Commissioning Service Lead role was currently vacant and sought clarification on timings for when this role would be filled and the impact of this vacancy on roles and streams of work that reported into this lead role. Ash Hussain explained that the previous postholder had recently left the organisation and interim arrangements were being considered. Ashley Milum added that recruitment to the permanent post was underway and an interim appointment would be put in place to ensure continuity whilst the recruitment process was completed.

Ashley Milum provided further context on the development of the commissioning function, noting that it was a relatively new area of work within West Berkshire. He explained that commissioning would play an increasingly important role in ensuring services delivered value for money and met the needs of children and young people, particularly in relation to the Dedicated Schools Grant (DSG) and High Needs Block. He further advised that the function would support work to ensure children could access the right provision at the right time, and that this would need to complement the work currently taking place through iCollege. He noted that the Schools' Forum would receive further updates on commissioning activity, particularly in relation to SEND reforms and AP.

Councillor Iain Cottingham commented that the Local Authority had invested in strengthening the commissioning function and that a business case had been presented to the Executive. He noted the importance of securing the right expertise to support this work and ensure good value for money, whilst also ensuring that children and young people received the most appropriate packages of support to meet their needs. Councillor Cottingham further commented that the market could be challenging to navigate, particularly given the varying levels of regulation and the involvement of private providers.

Rebecca Hartley referred to the questions posed as part of the presentation and suggested that greater use of joint placements between mainstream and specialist settings could further strengthen partnership working. She commented that this approach had worked well in other local authority areas and could help improve outcomes for children whilst reducing costs for the Local Authority. Ash Hussain thanked Rebecca Hartley for the suggestion and confirmed that the feedback would be noted as part of the ongoing development of commissioning arrangements.

RESOLVED that the Schools' Forum noted the presentation.

8 Deficit Schools (Edith Cheng)

Edith Cheng introduced the report (Agenda Item 9), which provided an overview of maintained schools operating with either planned or unplanned deficits during the 2025/26 financial year.

It was reported that 13 schools had set licensed deficit budgets for 2025/26, with a further two schools recording unplanned deficits at year end. The overall deficit position across maintained school budgets was approximately £1.39 million. This represented a significant increase from the previous year, when 10 schools had been in deficit with a combined deficit of approximately £0.59 million.

Edith Cheng advised that the deterioration in the financial position was believed to be driven by a combination of factors, including falling pupil numbers, continuing staffing cost pressures and increasing levels of SEND need. Particular pressures were being experienced where schools were supporting pupils with complex needs before Education, Health and Care Plan (EHCP) funding had been secured.

It was noted that detailed information on the schools concerned had been provided within the report. Edith Cheng explained that the report had been presented for information and to support the Schools' Forum's ongoing oversight of school financial sustainability.

RESOLVED that the Schools' Forum noted the report.

9 Forward Plan

RESOLVED that the Schools' Forum noted the forward plan.

10 Date of the next meeting

The Forum was invited to comment on the format of future meetings. The Chair noted that virtual meetings appeared to achieve higher attendance levels and, with no preference expressed for an in-person meeting, it was agreed that the meeting on 12 October 2026 would be held virtually via Zoom.

(The meeting commenced at 5.00 pm and closed at 6.10 pm)

CHAIR …….

Date of Signature …….