

Schools Forum

Date: 27 June 2024

Time: 4.00pm

Venue: Virtual Teams Meeting

Reports

Reports will be emailed to members prior to the meeting. Papers can also be accessed on the Council's website

<https://new.calderdale.gov.uk/schools-and-learning/schools/services-schools/a-z/schools-forum>

Members of the Forum

Primary Heads Maintained x 2

Mungo Sheppard (Ash Green Primary School)

Lauren Watson (All Saints CE Primary School)

Primary Governors Maintained x 2

Louise Downing (Cross Lane Primary School)

Gareth Morris (Ferney Lee Primary School)

Primary Head Teacher Substitute

Alice Leadbitter (Todmorden J, I & N)

Secondary Head Maintained

Tony Guise (Calder High School)
(Chair)

Secondary Head Teacher Substitute

Vacant

Secondary Governor Maintained

Gill Shirt (Todmorden High School)

Special School Representative

Debbie Sweet (Highbury School)

Academy Members x 6

Karen Morley (Scout Road Academy)
(Co-Vice Chair)

John Eccleston (Warley Road Primary Academy)

Dan Burns (Old Earth Primary School)

	Richard Horsfield (Brighouse High School)
	Brian Robson (Brighouse High School)
	Phillip Hannah (The Whitley AP Academy)
	Stephen Baines (Trinity MAT)
	Stuart Hillary (Park Lane)
Academy Bursar x2	Ivan Kuzio (Trinity MAT)
	Vacant
Roman Catholic	Brenda Monteith (Highbury School)
Church of England	Vacant
Calderdale Federation of Education Staff Unions	Lisa Davies (National Education Union)
Post 16 Representative	Karl Veltman (Calderdale College)
Early Years Representative x2	Denise Gwizdak (Pye Nest Day Nursery)
	Andrea Dyson (Tot Spot Day Nursery)
Cllr Adam Wilkinson, Cabinet Member for Children's Social Care and Lead Member for Children's Services. (Observer status only)	

AGENDA

1. **Substitutes nominated for this meeting and apologies for absence. (To be notified in writing 24 hours in advance.)**
2. **Members Interests** – Members are reminded of the need to declare any interest they might have in relation to the items of business on this agenda.
3. **Admission of the Public** - it is not recommended that the public be excluded from the meeting for the consideration of the items of business on this agenda.
4. **Minutes of the Schools Forum held on 25 April 2024**
5. **Review of Schools Forum Constitution including:**
 - **Proposal from Debby Simpson on Academy positions on Schools Forum**
 - **An update on the CMBC Schools Academic Year 24/25 (Maintained/Academy)**Verbal Consultation / Decision
6. **DSG Management Plan Report (Termly Review) / update on the High Needs Block Group**
Update/clarification
7. **Capital Projects and Expansion of Special Schools**
Update/clarification
8. **Update on Schools Rebuilding Programme Report**
Verbal update / Clarification
9. **Additional Funding allocation to School Clusters June 2024**
Consultation / Decision
10. **Issues of Schools Forum voting on clawback of significant school balances**
Verbal clarification

Ian Hughes

David Graham
Victoria Coyle

David Graham
Victoria Coyle

Richard Morse

Connie Beirne

Jane Davy

11. School Balances as at 31 March 2024 & Future Budget Plans **Jane Davy**
View / Information

12. Any Other Business **Chair**
Questions to be submitted a **minimum** 3 days prior to the meeting in writing to:
CalderdaleSchoolsForum@calderdale.gov.uk
Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair.

13. Future Dates **Paul Tinsley**

14 November 2024
16 January 2025
24 April 2025
3 July 2025

All meetings will start at 4pm
Venue: Virtual Teams Meeting

CALDERDALE SCHOOLS FORUM
25th April 2024 – Virtual Meeting Via Teams

PRESENT:

Mungo Sheppard (Primary Maintained) – Substitute Chair
Karen Morley (Academy) – Co Vice Chair
Brenda Monteith (Roman Catholic)
Adam McNichol (Primary Governors Maintained)
Kevin Rivett (Unions)
Denise Gwizdak (Early Years Rep)
Mary Carrigan (Primary Governors Maintained)
Kevin Rivett (Unions)
John Eccleston (Academy Primary Governor)
Gill Shirt (Secondary Governor Maintained)
Lisa Davies (Unions)
Richard Horsfield (Academy Secondary)

IN ATTENDANCE:

Paul Tinsley (AD Education and Inclusion)
Jane Davy (Finance Officer)
David Graham (QA and Complaints Consultant)
Steve Drake (Finance Officer)
Richard Morse (Senior Commissioning Officer – School Organisation and Planning)
Victoria Coyle (SEN Manager)
Amanda Farron (Observing)
Connie Beirne (Interim Service Manager for Early Years and School Strategy and Performance)
Martyn Sharples (Finance Officer)
Ian Hughes (Legal Officer)

APOLOGIES

Tony Guise (Secondary Maintained) – Chair
Dan Burns (Academy Primary)
Phil Hannah (PRU)
Andrea Dyson (Early Years Rep)
Karl Veltman (Post 16 Representative)
Debbie Sweet (Special School)

1. Substitutes nominated for this meeting and apologies for absence. (To be notified in writing 24 hours in advance.)

Joanne Jones for Karl Veltman at Calderdale College
Mungo Shepherd for Tony Guise as Chair

2. Members Interests – Members are reminded of the need to declare any interest they might have in relation to the items of business on this agenda.

John Eccleston is a member of Schools Partnership Board.
Karen Morley is a trustee of Together Learning Trust and is an LA Governor for Christ Church Pellon. Her term of office at Scout Road has finished but there is a link with Together Learning Trust.
Adam McNichol is currently representing Primary Governors Maintained however, Hebden Royd School has converted to an academy but it remains a Church of England School.
Mary Carrigan is the primary representative for Todmorden but is also a trustee at NHGS and Christ Church.

3. Admission of the Public - it is not recommended that the public be excluded from the meeting for the consideration of the items of business on this agenda.

Mick Burns from National Education Union
Amanda Farron from Finance

4. Minutes of the Schools Forum held on 18th January 2024

Item 6 – Head teachers have raised concerns around the potential increase in fees for school improvement going forward. The Chair would like to make Connie aware there are queries from individual heads regarding costs and would like this to be an agenda item for when it comes to the vote next year. Jane advised that a decision in principle can be brought to an earlier meeting but members are to be mindful that figures not available until December. This could also be presented to CHPA to discuss for their January meeting.

Primary head feels they need to be part of the process regarding the HNB.

Karen is happy with the figures provided in reports and brought back to the meeting today.

The minutes were agreed by the Chair and members.

The school improvement de-delegation request will be added to the autumn work plan and brought forward to the autumn Schools Forum meeting to allow members to have time to consult with schools before January. Members are happy to have an amount that will be requested and an indicative of per pupil amount. From this, members could decide in principle which, will be confirmed at the January meeting.

The 2024-25 meeting dates will be discussed with the Chair and circulated before the next meeting in June.

5. De-Delegation of Union Facility Fees (Revised report)

Unions were asked to bring the report back to forum with a more equitable increase which they feel the report reflects.

Members asked why this was a differential increase of 40p and it was explained that this amount was agreed 3-4 years ago. Jane sent the amount to ESFA however, would members want to continue with the 40p or approve the new recommendations from the figures shown in the report?

Lisa Davies Q: have you sent the original figures to ESFA we asked for in January?

Yes, the template was sent off by the 21st January. The overall amount hasn't changed, there is a £953 increase with the new rates. I would need to go ack to the ESFA and say this is an internal adjustment if Schools Forum agree the new recommended amount.

The Chair acknowledged there are a lot of head teachers absent from the meeting however, it was noted that Maintained Representatives can vote apart from LA officers, Union Representatives and Academies.

Schools Forum have already approved the delegation of fees and the narrative to the 12% being approved.

Approved: Primary 2, Secondary 1

Opposed: 0

6. Update on the Union Facilities Figures to the ESFA

Jane will contact ESFA colleagues and confirm if they need her to resend her template. She advised this will affect anyone who converts to an academy after the 1st September as she will keep the figures until March 2025. Jane will write to schools in June with the adjustment but please note, this will not be a significant amount.

7. High Needs Block Deficit Recovery Plan Report April 2024

Karen Morley Q: In regard to option 2

1. How many places would this provide (how does that match numbers of children requiring SEMH)? If these pupils are moved from existing schools what are the implications for the schools?

This will provide between 80 and 100 places. We do not envisage any pupils moving from maintained special schools. The impact will be to avoid Independent Non-Maintained Special School places with some transfers back into LA provision.

2. What is the present position? I understand that there is opposition from Ravenscliffe
The current plan is to use this as a SEHM school. Ravenscliffe would prefer to retain the current site at Spring Hall and vacate the site at Skircoat Green. However as set out in the options paper, the cost would be significantly more, to build more provision when one already exists. There are currently ongoing discussions and officers are to meet with governing body. There will be an additional 100 places created at Ravenscliffe.

Karen Morley Q: In regard to option 3:

1. Woodbank - additional approximate 40+ spaces, how does this match demand?
We anticipate these numbers will add sufficiency to meet the growth in those areas.
2. Highbury - At least an additional approximate 40+ spaces. How does this match demand?
We anticipate these numbers will add sufficiency to meet the growth in those areas.
3. AP Free School additional capacity for Calderdale Pupils - How many places – will it be primary and secondary places and how does this match demand?
80 secondary places. Calderdale will commission 40 places with Delta brokering the other places to other LA's.
4. AP or ARP within a mainstream primary school - Number of places this will provide & type of provision- how is this spread geographically?
This would provide 2 secondary 10 place additional resource units, 4 SEMH additional resource units for KS1 and KS2, 20 secondary place units for autistic conditions for KS3 and KS4 and x2 20 place additional resource units. Plus, the Expression of Interest in Alternative Provision is not a defined number due to this being part of the commission process. This will help with overall budget pressures. The spread will reflect demand and geographic population distribution.
5. HNB Deficit Management Group, it would be helpful to know when this will begin and how long the group will be required?
We will need the group as long as we are in deficit. We are currently working on a 5 year plan to hopefully achieve some sustainability. As we are all aware there are pressure nationally and a sustainable position will be difficult to reach.
6. Should there be a reference to the allocations group that is I believe already operational?
That can be discussed at the first meeting.
7. DSG and HNB Reference group members - There's no secondary schools representative/if I am academy rep and I covering primary & secondary and using my financial expertise?
Membership will be discussed at the first Meeting in May.

The Chair commended David for the information shared and primary heads recognised the need for additional provision and are excited about the increased capacity for places. They recognise that it is important that the secondary provision grows as well.

Chair Q: In regard to the provisions that schools run for children in their own schools, in terms of the exceptional bids schools are making, will these schools still work with the exceptional funds panel?

Yes and Victoria will send communication regarding the process and potential funding opportunities within The Change Programme for schools regarding excellent and innovate ways to help.

John Eccleston Q: Am I to assume that at the end of the 5 years, we should have the facilities we need?

Yes, we are already working dynamically with the 3 special schools and increasing the capacity for September 2025. The two new schools will be completed within the 3 – 5 year time frame and hoping ARPs will start to be open for January 2025.

John Eccleston Q: What level of confidence do you have that the number of places are going to be sufficient to the 5 – 10 year timescale?

That is the real challenge and Antony Mugan working with us looking at historic population trends for future trends and has predicted the number of children with SEN. We are proposing a significant investment in order to save and achieve sustainability. The deficit is going increase in the short term and we need to address placements in independent and non-maintained schools and volume of EHCP's. All the provisions proposed are much more cost effective.

Paul hopes CPHA colleagues can see Victoria and David have a clear process in place for a new SEND and AP strategy. The paper highlighting increasing special school places for children with Special Education Needs was taken to Cabinet and LA officers' recommendations were agreed to. The funding can only be used legally if we are creating additional capacity however, until the full feasibility study has been completed, we will not be aware of the costs involved. There is no guarantee that we will receive more money in addition to funds we have at the moment. The job advertisement for an additional AP lead has gone live recently and we are inviting secondment from someone potentially in the schools sector preferably. We are currently supporting the National Change Programme which give us the funds to help create something innovative. We want to reinvest the money we clawback from schools excluding pupils when they exclude pupils to into creating more AP capacity locally.

8. Calderdale CSSB Funded Statutory Services for Schools / Allocation of 2024/25 Central School Services Block (CSSB)

Karen Morley Q's:

1. With regards to the CSSB report I would like to ask officers for a breakdown of the £451,560?
2. What is the cost of the
 - Admissions Function
 - Fair access officer
 - Asset management/PFI officer
 - School organisation & asset officer

Role Profiles have been included as requested. Job profiles for the School Organisation Officer and Asset Management Officer are combined to give us flexibility around moving resource to the most pressing area and also resilience in case of anybody leaving the post. There are two posts and one role profile for Organisation and Asset and one for the Fair Access Officer. Service is predominantly a staffing only budget (some software licences required). Cost of 'new' element (i.e. roles approved by Schools Forum for Fair Access, SRP, PFI and Asset Management)

Fair Access – Po2 to Po5 Range with on costs: £46,679.78 to £49,999.49

Org and Asset – Po1 to Po4 Range with on costs: £45,498.66 to £48,739.88 x2 posts (combined role). Annual mileage to be added.

3. Forum asked for job descriptions for these posts and they have not been made available (as far as I am aware)-please can they be circulated? have people been appointed to these 3 new posts? Please provide progress to date on the work they have undertaken.

The job descriptions will be circulated with the final minutes for members information.

There is an unallocated balance of £200k for the 2024/25 CSSB. This is made up from £54k which hasn't been allocated in 2024/25 & an underspend in 2023/24 of £146k which can be used in 2024/25. Forum approved that the £54k in year balance be used to fund the new Education Welfare model outlined in the report & that an options paper be brought to the next Schools Forum as to what to do with the remaining £146k. Cluster funding has fallen significantly, and Karen suggested putting money aside as a reserve or used to increase the cluster funding.

The Chair Q: In theory, what that would look like?

Paul suggested 50% of the remaining underspend feed into the cluster funds and keep the remainder for potential emergencies.

Paul made a proposal for 50% of the underspend to go towards bolstering available cluster funding for this year. This will be voted on at the next meeting.

Schools Forum are to consider and vote on the allocation of £54k to the Education Welfare Service and its Education Welfare Officers.

Vote to uplift the Education Welfare Service:

Approved: 7

Opposed: 0

Schools Forum to consider the surplus money and vote on how that money can be used. A proposal to be presented to look at keeping for emergencies and offsetting the cluster funding either by using half or to look at using an existing model to give the clusters more money, leaving less funds to go forward.

Vote to bring this to the next meeting for consideration:

Approved: 7

Opposed: 0

Approval of CSSB allocation

Each line of the CSSB put forward in the report presented by Steve was approved by Forum also

9. School Balances Spring Report 2024

Primary school heads recognised the spends being made highlighted in the report. They feel the money they get in and the money that goes out is a lot closer to what is set out on the report. John Eccleston is concerned that there are children with complex needs and worries we are doing well on the financials side but children's experiences are deteriorating in school.

The Chair thanked Jane for the information provided in the report.

10. Update on Schools Rebuilding Programme Report

Richard feels positive with the way things are progressing within his service. The planning for the new build of Castle Hill school starts next week, new job positions have been created within the service and he has had positive comments from DfE.

The Chair commended the work that Richard and Robert Fox are doing and the positive relationships that have been built with the DfE.

11. Review of Schools Forum Constitution

Ian feels the current constitution is still fit for purpose. Unfortunately, the meeting between Ian and Tony has not happened however, this is especially important when Tony is due to step away from chairing Schools Forum. Ian will bring the review of the constitution to the meeting in June with his amendments and will clarify points with individual members.

John Q: Does the forum constitution and membership almost need to have flexibility built in to reflect maintained schools and academies?

I want to discuss this with Tony in regard with the changing ratio as it needs to be responsive and relevant to Calderdale's ever-changing landscape.

12. Any Other Business

Questions to be submitted a **minimum** 3 days prior to the meeting in writing to:

CalderdaleSchoolsForum@calderdale.gov.uk

Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair.

No further business was discussed.

13. Future Dates

27 June 2024

All meetings will start at 4pm

Venue: virtual Teams Meeting

Report to Schools Forum

Item	6
Meeting Date	27 June 2024
Subject	High Needs Recovery Plan for DfE 2023 -2024
Report Author	Paul Tinsley – Interim Assistant Director Education and Inclusion David Graham – Interim SEND and Inclusion Service Manager

Report purpose

To manage the increasing deficit within the Dedicated Schools Grant (DSG), a High Needs Block Recovery Plan is in place which seeks to stabilise the increasing overspend alongside improving outcomes for children and young people and creating a sustainable system within Calderdale to meet the needs of children and young people with SEND

Need for consideration

For information only

Need for decision

For information only

Contact Officers

Paul Tinsley – Interim Assistant Director Education and Inclusion

Paul.tinsley@calderdale.gov.uk

David Graham – Interim SEND and Inclusion Service Manager

David.Graham2@calderdale.gov.uk

1. Background information and context

- High needs budgets in English local authorities (LAs) have come under increasing pressure in recent years with a significant proportion of authorities finding it difficult to deliver their local need within the budgets allocated to them.
- Calderdale has been one of the few LA's who have met the needs of their pupils with SEND within their DSG High Needs Block. However, due to unprecedented pressure this position has significantly changed within the last two financial years.
- The DfE acknowledges the pressures which local systems are experiencing delivering special educational needs and disability (SEND) services and officers have been working with the DfE as a partner within the national Change Programme.
- [The SEND Change Programme](#) is a national program in England that aims to test some of the changes the government wants to make to the system for supporting children and young people with special educational needs and disabilities (SEND) . The program is being delivered by "Change Programme Partnerships" in each of the nine regions of England, each led by at least one named local authority . The program is expected to run over the next 2 to 3 years with selected local authorities in 9 regions, working alongside families to implement, test and refine longer-term plans . The program includes investment in training for thousands of workers so children can get the help they need earlier, alongside thousands of additional specialist school places for those with the greatest needs . The transformation of the system will be underpinned by new national SEND and AP standards, which will give families confidence in what support they should receive and who will provide and pay for it, regardless of where they live . The program aims to provide better, fairer access to high-quality special educational needs and disabilities support .
- Calderdale Schools Forum continues to be a key partner in developing the DSG Deficit Management Plan which is a DfE requirement for LAs in deficit.

2. Actions completed

- The first meeting of the HNB Deficit Reference Group was held on the 8th May 2024 which accepted the Terms of Reference, discussed membership of the group and undertook an overview of the HNB funding arrangements.
- The second meeting is scheduled for the 25th June 2024 and will look at the Outturn of the 2023 – 2024 HND Budget and the Budget set for 2024-2025. It is anticipated that the HNB Reference Group will be in place until the HNB achieves a balanced budget.

- Officers have undertaken a review of the HNB Budget cost centres in line with current ESFA guidance which has resulted in moving costs out of HMB to CMBC Base Budget which has resulted in a reduction of the deficit for 2023 -2024 by £767,210 and impacted positively on the HNB Budget for 2024-2025. However, the outturn for 2023/24 was an overspend of £5,255,103. This means there is a cumulative overspend of £6,123,103 when you include the 2022/23 overspend.
- Based on the 1st budget monitor undertaken by Officers the High needs overspend in 2024/25 could be as high as £12million in 2024/25, meaning a cumulative overspend of £18million by the start of next year. Whilst plans are being put in place to reduce the overspend in the long term the deficit will increase in the short term.
- Officers are meeting regularly with the ESFA as part of their condition for agreeing to the 0.5% transfer from Schools Block. This additional monitoring will continue through the next financial year and will continue to have reference to the Deficit Management Plan and HNB budget.
- At the most recent meeting the ESFA representatives commented positively about the engagement of Schools Forum in the HNB Deficit Reference Group and oversight of the HNB Deficit Recovery Plan. They also noted the pace and breadth of action being taken in respect of engagement in the Change Programme, creation of ARP's and AP in mainstream primary and secondary schools, creation of the Good Learning Places Panel and Exceptional Needs Panel, work on the capital programme and focus on clearly defining the ordinarily available provision for pupils with SEND in mainstream schools.
- The ESFA accepts that Calderdale will continue to have a rising deficit in the short term whilst work is undertaken to bring the HNB into an in-year balance and the deficit is reduced.
- Calderdale does not currently meet the criteria for the Safety Valve Programme which is a DfE initiative to help local authorities address overspending on SEND services. It is by invitation only and based on a rigorous agreement on the action to be taken and intensive monitoring. The programme usually lasts from four to seven years and involves expert external support and an injection of funding to support measures to reduce the overspending. The current programme has been closed to new agreements and it is anticipated that it will not re-commence until the Autumn after the General Election.
- For 2024-2025 Calderdale did not receive capital funding for pupil place growth. Officers questioned the ESFA regarding potential capital funding for the growth in special school places as the annual school capacity survey (SCAP) now includes projected numbers for special schools and Additional Resource Provisions as well as mainstream pupil numbers and projections. The ESFA are going to feedback when they have established the position in relation to this.

3. Reference documents

- [High needs funding: 2023 to 2024 operational guide - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/high-needs-funding-2023-to-2024-operational-guide)
- [Dedicated schools grant \(DSG\) deficit management plan - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-deficit-management-plan)
- [Special Educational Needs and Disabilities \(SEND\) and Alternative Provision \(AP\) Improvement Plan \(publishing.service.gov.uk\)](https://publishing.service.gov.uk/government/publications/special-educational-needs-and-disabilities-send-and-alternative-provision-ap-improvement-plan)

Report to Schools Forum

Item	7
Meeting Date	27 June 2024
Subject	Capital Programme
Report Author	Paul Tinsley – Interim Assistant Director Education and Inclusion David Graham – Interim SEND and Inclusion Service Manager

Report purpose

Update on the progress of the Capital Programme to create additional special school places and increase the number of Additional Resource Provisions (ARP's)

Need for consideration

For information only

Need for decision

For information only

Contact Officers

Paul Tinsley – Interim Assistant Director Education and Inclusion

Paul.tinsley@calderdale.gov.uk

David Graham – Interim SEND and Inclusion Service Manager

David.Graham2@calderdale.gov.uk

1. Background information and context

A report was presented to CABINET, Monday, 11th March, 2024 where it was RESOLVED that: (a) Option 2 and 3 outlined in the Director, Children and Young People's Services written report be approved; and (b) the Director, Children and Young People's Services, in consultation with the Cabinet Member with responsibility for Children and Young People's Services be given delegate authority to progress all necessary processes. The relevant options were listed as follows:

Option 2: Release land in North Halifax to develop an additional campus for Ravenscliffe School, keeping the current Skircoat Green site but releasing the Spring Hall site to develop a setting for pupils with Social Emotional and Mental Health needs. So Ravenscliffe would remain in use, with its facilities e.g. hydrotherapy pool. More physical space for students would be created by some moving to the new site along with the Spring Hall sixth form students.

Option 3: In addition to Option 2, further expand the primary special school estate as follows:

- Woodbank – Increase primary spaces on existing site or with an additional building. (Additional approximate 40+ spaces)
- Highbury – consult on the possibility to increase primary spaces on existing site with use of the Lower Edge building. (At least an additional approximate 40+ spaces).

2. Expressions of Interest Update

There have been sixteen expressions of interest in the establishment of an AP or Additional Resource Provision (ARP) within mainstream primary and secondary schools.

3. Actions completed

- There is ongoing discussion regarding the proposed site for the new AP Free School in partnership with Delta Academy Trust and further consideration of the capacity of the school. As this is a DfE led project officers are working closely with Delta Academy Trust staff and the DfE to progress the project.
- The expressions of interest for Additional Resource Provisions have been considered by the Good Learning Places Panel and officers are having initial meetings with schools to confirm staffing structures and capital requirements for each provision. It is anticipated that the first of these new provisions will open in January 2025.
- The expressions of interest for Additional Resource Provisions have also been considered by the Good Learning Places Panel. There have been sixteen expressions of interest in the establishment of an AP or Additional Resource Provision (ARP) within mainstream primary and secondary schools.

- There have been initial discussions with Woodbank School and a scoping exercise to determine if four additional classrooms and a hydrotherapy pool can be constructed on the current site. This has had a positive outcome and a proposal will be made to Cabinet to allocate and seek agreement for a feasibility study and allocate a notional budget for the project. In the short term Woodbank have made additional places available for September 2024 by internal re-organisation and increasing the space utilised at Luddenden CE School.
- There are ongoing discussions with Highbury School regarding expansion of their site. In the short-term Highbury have made additional places available by internally re-organising and utilising space to create additional teaching space.
- Following discussions with Ravenscliffe School Governors and Leadership Team it has been determined that the school will not expand beyond the current agreed four additional classrooms at the Spring Hall site. Additional interim capacity has been created at Spring Hall with two porta cabins and these will be increased to four to provide additional teaching space for September 2024.

4. Further actions

- A paper will be submitted to Cabinet for consideration of a new Academy Free School for secondary age pupils with General Learning Difficulties, creation of a provision for pupils with Social Emotional & Mental Health difficulties and expansion of Woodbank and Highbury Schools.
- Officers will continue to work with the DfE and Delta Academy Trust in respect of the new AP Free School.
- The creation of additional AP and ARP provisions will be undertaken in partnership with the mainstream schools who submitted expressions of interest. This is anticipated to be over a two-to-three-year programme subject to capital funding being available for the proposals requiring a higher level of capital investment.

5. Reference documents

- [Special Educational Needs and Disabilities \(SEND\) and Alternative Provision \(AP\) Improvement Plan \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

Report to Schools Forum

Item	9
Meeting Date	27 June 2024
Subject	Additional allocation of Funding to School Clusters 24/25
Report Author	Connie Beirne Interim Service Manager for Education Quality and Strategy

Report purpose

To provide members of Schools Forum with a summary of the impact of funding allocated to each cluster via the agreed formula and why if additional funding is granted, it will continue to enhance the work between all of our schools and benefit all the children of Calderdale.

Our schools are working hard to ensure that despite challenges of falling rolls and deficit budgets, our children are still receiving a good quality education.

Need for consideration

At the previous Schools Forum meeting held on 25 April 2024, there was an identified underspend within the CSSB of £146K for use in 24/25. It was noted that cluster funding has previously been allocated at £364K per year but this year, funding has been significantly reduced to £266K, resulting in a loss of £96K across our eight school clusters. This can be clearly seen in **Appendix 1**.

Need for decision

Paul Tinsley offered the proposal for consideration of the remaining £146K to be divided as follows: 50% of the funding (£73K) to go towards bolstering available cluster funding this year and to keep the remaining 50% (£73K) for potential emergencies that may arise during the year.

If this decision can be reached then it will enable school clusters to continue with longer term projects which are proving beneficial as well as begin those which have been funding prohibitive before.

Contact Officers

Connie Beirne – Interim Service Manager for Education Quality and Strategy
connie.beirne@calderdale.gov.uk

1. Background information and context

- a) The Calderdale Partnership School Improvement Board (CPSIB) working with Local Authority officers oversees the allocation of funding to school clusters and holds them accountable in terms of the impact evidenced in meeting each clusters priorities laid down at the start of the academic year.
- b) The Board is made up with representation of each Lead cluster Headteacher and meet four times per year. The purpose of each meeting is for each cluster to be able to share good practice, as well as identifying the strengths and challenges of the work being undertaken.
- c) A full breakdown of funding allocations is provided in **Appendix 1**.
- d) Each cluster is asked to include and refer to the Local Authority Priorities identified each year. For 24/25, these are:
 - To reduce the inequalities that exist and ensure that every child/young person in Calderdale is successful, demonstrating fully their talents and being well prepared for their future stages of education and employment.
 - To ensure that all our young people and workforce have their emotional, social and wellbeing needs met, are resilient and live an enjoyable and fulfilling life
 - To address the ongoing local recruitment and retention crisis, exacerbated by the pandemic from initial Teacher Training through to Executive Leaders
- e) We also work to our Calderdale School Improvement Strategy 2023/24 which is our Protocol for Monitoring, Challenge, Support and Intervention in Schools
- f) Use of this funding enables clusters to be professionally led by a cluster officer (remunerated through cluster funding) as well as the cluster Lead Headteacher. As a result, the improvement plans are sharply focused in clusters to ensure that local priorities are addressed, linked to the LA priorities and each school's development plan.
- g) The Board made the decision in March 2023, that all funds would be distributed to each school cluster. However, this funding is restricted to Pre-16 pupils, in which case these funds are not available for Post 16 provision.

2. Main issues for Schools Forum

- a) A programme of improvement work, through clusters and the Calderdale Primary Development Programme has continued to address key priorities. Work has also taken place to support schools with curriculum development. These programmes have been highly successful and impact is evident in schools.

- b) Maintained schools causing concern continue to have contact from their allocated School Effectiveness Officer/Associate during the summer term and with School Forum's decision for funding being made available to continue the Local Authority's statutory duty of support, challenge and brokering of support through to March 2025.

3. Recommendations

Schools Forum award the additional £73K of funding to school clusters.

4. Reasons for recommendations

- a) All our schools work collaboratively together within clusters to provide our children with the best educational outcomes. Funds are spent wisely and impact of this work can clearly be evidenced. (See 5f below)
- b) Schools have continued to experience challenges post-pandemic and the work of clusters and the School Effectiveness Service has been vital in supporting schools to respond and continue to focus on the quality of education and the safeguarding, health and wellbeing of pupils and staff.
- c) Whilst the impact of funding allocation is evident through the excellent response of schools and the improvements already secured, further work is required to ensure children in Calderdale achieve at least as well as their peers nationally at all key points and are educated in schools that are at least Good.
- d) School improvement funding is required to support clusters and schools in closing those gaps. At present, there remains twenty-seven schools (academies and maintained) who are risk assessed as having concerns or significant concerns that they need to be supported to address the priorities needed to improve.

5. Impact of funding, targets, and milestones

- a) Almost all schools engage well with the self-improving school cluster model and benefit from joint working and improvement work specific to the needs of the cluster. Consequently, this funding is having a measurable impact on outcomes for children and young people across the borough.
- b) Primary/secondary/A level assessment results in 2023 were positive. The pandemic affect is still playing a part in Calderdale's outcomes, but to a lesser extent than that nationally and in comparison, to our regional and statistical neighbours.
- c) The School Effectiveness team continue to engage headteacher in their own self-assessment process, with the publication of statutory assessments in July 2023. This was highly successful last year, with fifty-nine returns made,

in ensuring an accurate LA risk assessment for each school. Heads also provided information around their strengths and challenges for the coming year.

- d) The School Effectiveness team, work with Business, Performance and Intelligence officers to conduct a detailed analysis of unvalidated data each year. This can then be shared and discussed with Cluster officers in ensuring that their cluster plans for 2024/25 reflect both LA and cluster school priorities.
- e) 83% of Calderdale schools were judged to be Good or better at the end of April 2024 compared to 88% nationally. The proportion of primary schools that are judged good or better is 83% compared with a national of 89% and at secondary 77% compared with a national of 80%. The special schools compare favourably with national with 100% good or better compared with national at 89%. Improving the Ofsted rating of schools in Calderdale remains a priority to be addressed but out of twenty-three inspections so far, this academic year, (22 reports published) all schools have been judged good or outstanding and four schools have moved from requires improvement to good
- f) Detailed below are some actions/evidence/impacts of the work going on within our school clusters. Full action plans and midyear cluster reports are available upon request from Carolyn.rooke@calderdale.gov.uk

Name of Cluster	Progress/Evidence of impact – September 23
East Calderdale	<p>Improve quality and accuracy of writing. Expected and greater depth outcomes improved across all cluster schools in both KS1&2 in 2023.</p> <p>Effective SEND network set up across all schools.</p> <p>LINGO programme delivered improvement in targeted children's SLC.</p> <p>Forest school development extended to further cluster schools.</p>
North Halifax	<p>Attendance focus in 2022/23 resulted in whole cluster attendance increased to 95% and PA reduced from 20% in 21/22 to 18%.</p> <p>Shared good practice and systems set up across all cluster schools to reduce suspensions and permanent exclusions, especially of those pupils with SEND. This priority continues into 23/24.</p>
Calder Valley	<p>English focus within all cluster schools resulted in Reading and writing expected outcomes above national at both KS1&2 in all schools.</p> <p>In terms of Quality of education, 5 Ofsted undertaken with quality of education graded good in each school. Alongside</p>

	Sharing good practice within SEND, purchase of resources and collaborative work across schools.
Elland	<p>Raising standards in writing: Cluster average positive and above national average 2023.</p> <p>Support Wellbeing of pupils: Most schools have put strategies into place, including a cluster wellbeing strategy, protocols year 6-7 transition and an audit of provision and needs undertaken.</p> <p>100% of schools participating in MHST have a trained Mental Health lead.</p>
Todmorden	<p>Successful delivery and Implementation of LINGO project. 81 children receiving intense support with 40 at the end of year discharged as now age appropriate in terms of their SLC and of the remaining 90% of children with improved SLC skills.</p> <p>Hard to reach families project successful in 2 cluster schools. A total of 39 families worked with involving 62 children. Improved attendance and PA reduced in both schools.</p>
Sowerby Bridge	<p>Attendance focus in 2022/23 with whole cluster attendance increased to 95% and PA reduced from 19% in 21/22 to 9%.</p> <p>Joint training held on the delivery of a Quality Inclusive curriculum and sharing of good practice with some collaborative practice taking place across 3 schools.</p> <p>LINGO evidenced an improvement in targeted children's SLC.</p>
Secondary	<p>Improve pupil's HWB with Education Psychology service commissioned for all schools. Engagement with EHNA.</p> <p>Continued delivery of successful professional development programme for senior leaders involving 4 schools. All subject networks run to collaborate and share good practice amongst subject leaders in all schools.</p> <p>Ofsted inspections, 6 out of 7 schools judged good or outstanding.</p>
Special	<p>Coaching for all Headteachers and senior staff in place. Maths, PSHE and Reading networks established.</p> <p>Shared CPD has taken place utilising specialisms across all schools.</p> <p>Pilot ITT programme with ECT's implemented at Highbury to support staff moving into specials schools from mainstream.</p>

6. Resource implications

The award of these additional funds will enable clusters to continue longer term projects as well as develop and address new areas presented.

The funding for the self-improving school cluster model is having a positive impact on improving outcomes for children across Calderdale.

7. Appendices

Appendix 1

Calderdale Partnership School Improvement Board Cluster Funding - Allocation 2023-24		
Calder Valley (Midgley)		£30,038
East Calderdale (Savile Park)		£41,467
Elland (Cross Lane)		£33,719
North Halifax (Savile Park)		£45,513
Secondary (The Whitley AP Academy)		£84,079
Sowerby Bridge (Savile Park)		£33,561
Todmorden (Walsden St Peter's)		£30,358
Special Provision (William Henry Smith)		£30,161
Total		£328,897

Total all funding		£328,897
Cluster Formula allocations – as above		£328,897

Cluster Funding - Allocation 2024-25			Loss from 23/24
Calder Valley (Midgley)		£26,871	£3,167

East Calderdale (Savile Park)		£33,052	£8,415
Elland (Cross Lane)		£28,361	£5,358
North Halifax (Savile Park)		£36,335	£9,178
Secondary (The Whitley AP Academy)		£56,714	£27,365
Sowerby Bridge (Savile Park)		£27,790	£5,771
Todmorden (Walsden St Peter's)		£26,990	£3,368
Special Provision (William Henry Smith)		£29,404	£757
Total		£266,000	

Total all funding		£266,000	
Cluster Formula allocations – as above		£266,000	

Report to Schools Forum

Item	11
Meeting Date	27 June 2024
Subject	Maintained School balances as at 31 March 2024 and Three year Budget plans
Report Author	Jane Davy

Report purpose

To provide Schools Forum with the final revenue balances for all maintained schools at the end of the 2023/2024 financial year and the estimated revenue balances for all maintained schools following receipt of their budget plans for the next three years

Need for consideration

Schools Forum to consider and give a view on the report

Need for decision

N/A

Contact Officers

Jane Davy-LMS Finance Manager
Jane.davy@calderdale.gov.uk
 01422 393543

1. Background information and context

- a) All schools hold revenue balances at the end of each year to allow for unforeseen events and emergencies, and in some cases to smooth out the effects of changes in school rolls, changes to staffing structures and one off expenditure such as building work.
- b) The Council holds separate reserves or balances to cover the same events for all other Council expenditure. Schools are specifically excluded from the use of these balances and therefore need to maintain their own balances.
- c) School Forum agreed to maintain the clawback mechanism in the scheme for financing schools to ensure schools could be held to account if they held excessive balances.
- d) The Scheme for Financing Maintained Schools requires maintained schools to submit a three-year budget statement by the beginning of May, detailing how school resources are planned to be spent. These statements also show estimated school balances at the end of each year.
- e) The Scheme also requires school budget plans to be approved each year by the Local Authority. This is generally light touch but facilitates more work being undertaken where budget deficits are being projected
- f) This report covers Calderdale's 49 maintained schools (1 through school, 1 secondary, 44 primary and 3 special schools) and excludes academies that are subject to separate Education and Skills Funding Agency (ESFA) monitoring.

2. Main issues for Schools Forum

- a) Schools initially projected collective surplus balances of £7.83 million as at 31st March 2024. Their recent spring term monitoring statements projected revised surplus balances of £10.6 million.
- b) The accounts for all schools are now closed and the overall level of balances in Calderdale's 49 maintained schools (including community focused balances and cluster fund balances) is £11.16 million. Within this sum the amounts per sector are primary £6 million, secondary £2.13 million, and special £3.03 million.

This is an overall increase in balances on last year of £1.008m. A summary of the revenue balances held by each sector compared to last year is shown below (adjusted for academy conversions in year):

	Balances as at 31 March 2023	Movement	Balances as at 31 March 2024
	£000's	£000's	£000's
Primary	5,937	+59	5,996
Secondary	1,891	+240	2,131
Special	2,322	+709	3,032
Total	10,150	+1,008	11,159

- c) In the secondary school sector, there are two LA maintained schools, both of which have increased their surplus.
- d) In the primary sector balances have reduced overall, one school is in deficit, 43 Schools are in surplus. 6 schools are holding balances more than 20% of their annual income. 4 schools are holding balances either less than £40k or less than 2% of total income.
- e) In the special school sector, 3 schools balances have increased, 1 school is holding balances over 20% of total income. However, it is known this school will be using a significant amount to fund building programme in 24/25
- f) The Local Authority, in consultation with Schools Forum, introduced a balance control mechanism in 2011. In the first two years of the mechanism schools with balances above the recommended threshold were required to provide evidence of their commitments and some were subject to time limited arrangements at the end of 2011/12. However, Schools Forum agreed to suspend the balance control mechanism from 2020/21 onwards. As mentioned above in 1c it was agreed to keep the clawback mechanism in the Scheme for Financing Schools so that the LA and Schools Forum can hold any school to account if they continue to hold excessive balances over several years.
- g) It is surprising that school balances have increased overall. However, with only 7/12ths effect of increased pay award's, the teacher's pay award still not agreed for 24/25, support staff pay award not yet agreed for 24/25, energy costs are still unstable, inflation is dropping but with all the uncertainty, many schools will have put projects, purchase of resources and recruitment on hold to ensure they are sustainable moving forward.
- h) Maintained schools were asked to submit their three year budget plans by 1st May 2024, 41 budget statements were received by the deadline, the remaining 8 returns were received by the 7th May 2024. At the time of writing the reports 45 schools have been written to approving their budgets. 4 schools are projecting deficit budgets and will be written to individually, 2 of the 4 schools have had notification of additional funding and have been asked to resubmit their budgets. 1 school although submitted their budget have not yet had this approved by their governing body due to too many uncertainties, they have been asked to resubmit once the governing body

have approved their plans. For the final school, officers are awaiting further information from Senior Officers before writing to the school.

- i) From the 49 Schools, 22 schools are projecting to be in surplus for all three financial years. 13 schools are projecting to be in surplus for two years and then fall into deficit in year three, these schools will receive letters approving 24/25 and asked to look at making future savings when setting their 25/26 to 26/27 budgets. 10 Schools are projecting a surplus for 24/25 with deficits for 25/26 and 26/27, some of these schools will be asked submit monthly monitoring statements and all will be asked to resubmit a budget for 25/26 in October 24 when future pupil numbers and funding will be more certain.
- j) As mentioned above balances brought forward from 23/24 total £11.159million, maintained schools plan to reduce this to £8.01 million by March 25. Primaries reducing to £3.92m, secondaries increasing to £2.22m and special schools reducing to £1.868m
- k) For the longer 3 year period 23 schools are projecting deficit balances. However, schools have been prudent when projecting income for year three due to lack of information and based their budgets on known funding available. If the increase in income is not sufficient, these schools will have to look at reducing their expenditure from 25/26 onwards.
- l) At the time of presenting this report all schools (except 4) should have received a letter confirming that their submitted budget for 24/25 has been approved, as mentioned above some of those letters sound caution around the longer term projections and advise schools of the need to re-examine their plans for future years.
- m) Appendix A shows individual balances as at 31st March 24 and projected balances as at 31st March 25.

3. Recommendations

- 1. Members note the maintained schools' balances as at 31 March 2024.
- 2. Members note the original budget projections for the next three financial years.
- 3. Maintained members asked to vote on continuation of the suspension of the balance control mechanism.
- 4. A report is brought to the autumn term meeting based on Autumn 2024 projections.

4. Reasons for recommendations

By informing school forum, officers are complying with regulations set out in the scheme for financing schools.

5. Impact of funding, targets, and milestones

None unless Clawback mechanism is implemented

6. **Resource implications**

None unless Clawback mechanism is implemented

7. **Appendices**

Balances as at 31 March 24 and projected balances as at 31st March.

School Name	Revenue surplus bfwd from 23/24	Forecasted 23/24 in year deficit	Forecasted balance as at 31st March 25
	£	£	£
All Saints' CE (VA) J & I School	85,705	-68,427	17,278
Ash Green Primary School	156,417	-12,273	144,144
Bailiffe Bridge J & I School	127,803	-58,617	69,186
Barkisland CE (VA) Primary School	141,309	-27,757	113,552
Carr Green Primary School	51,953	9,650	61,603
Castle Hill Primary School	41,170	-40,582	588
Central Street Infant & Nursery School	118,974	6,279	125,253
Christ Church (Pellon) CE (VC) Primary School	-47,601	25,903	-21,698
Christ Church CE (VA) Junior School (Sowerby Bridge)	81,077	-39,752	41,325
Cliffe Hill Community Primary School	32,325	-55,669	-23,344
Colden J & I School	18,102	7,945	26,047
Copley Primary School	325,412	-78,146	247,266
Cornholme J, I & N School	81,113	-117,981	-36,869
Cross Lane Primary School	84,174	26,689	110,863
Elland CE (VA) J, I & N School	353,113	-140,354	212,759
Ferney Lee Primary School	129,481	-41,831	87,650
Holywell Green Primary School	61,707	-22,083	39,624
Ling Bob J, I & N School	205,933	-68,831	137,102
Longroyde Primary School	57,603	9,104	66,707
Midgley School	207,356	-62,886	144,470
Moorside Community Primary School	153,461	-24	153,437
New Road Primary School	224,278	49,459	273,737
Norland CE (VC) J & I School	84,887	7,188	92,075
Northowram Primary School	56,693	-53,219	3,474
Old Town Primary School	712	265	977
Parkinson Lane Community Primary School	999,387	-604,925	394,462
Ripponden J & I School	155,913	-4,081	151,832
Riverside Junior School	129,430	-21,117	108,313
Salterhebble J & I School	45,284	-6,999	38,285
Savile Park Primary School (Includes cluster funding)	130,404	-29,517	100,887
Shade Primary School	33,005	-26,826	6,179
Shelf J & I School	76,443	-36,717	39,726
St Andrew's CE (VA) Infant School (Brighouse)	76,808	-50,778	26,030
St Andrew's CE (VA) Junior School (Brighouse)	156,597	-80,452	76,145
St Mary's CE (VC) J & I School (Sowerby Bridge)	78,817	-3,707	75,110
St Michael & All Angels CE Primary School	122,960	-51,453	71,507
Stubbings Infant School	97,361	-30,206	67,155
Todmorden CE (VA) J & I School	370,812	-148,354	222,458
Triangle CE (VC) Primary School	89,733	-34,807	54,926
Tuel Lane Infant School	48,095	-31,921	16,174
Walsden St Peter's CE (VC) Primary School	172,853	-71,762	101,091
Warley Town School	88,292	583	88,875

Withinfields Primary School	135,307	-8,048	127,259
Woodhouse Primary School	110,812	-43,964	66,848
PRIMARY TOTAL	5,951,471	-2,031,001	3,920,470

Calder Learning Trust	1,110,512	67,972	1,178,484
Todmorden High School	1,021,120	19,740	1,040,860
SECONDARY TOTAL	2,131,632	87,712	2,219,344

Highbury School	500,759	68,914	569,673
Ravenscliffe High School	1,101,237	-482,043	619,194
Woodbank Primary School	1,429,779	-750,794	678,985
SPECIAL TOTAL	3,031,775	-1,163,923	1,867,852

OVERALL TOTAL	11,114,879	-3,107,212	8,007,667
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Schools Forum

Work Programme 2023/24

Prepared by

Paul Tinsley, Interim AD Education and Inclusion

*Reports are to be condensed to two pages where possible

Meeting date	Reports	Officer	Report for:	Deadline for papers
Meeting 19th October 2023	Confirm if allocating £2k (previously 1k) to Debby for Governor Support 23/24 due to increased workload	Paul Tinsley	Consultation / Decision	4 th October 12pm
	School Forum Constitution 4 Academy Vacancies - a secondary headteacher, a secondary governor and 2 bursars, appoint another union rep	Tony Guise	Discussion	
	Job description and verbal update on SRP	Richard Morse	Consultation	
	Growth Fund report	Jane Davy	Decision	
	Falling Rolls report	Jane Davy	Decision	
	Proposed School Block Transfer	Jane Davy David Graham	Decision	
	Indicative School Funding 2024-25 report	Jane Davy	Consultation	
Meeting 18th January 2024	Update on maintained school balances Report	Jane Davy	View/Information	19 th December 12pm
	Update on School Funding and Growth Fund Report	Jane Davy	View/Information	
	De-delegation of Unions Facility Fees Report	Lisa Davies	Decision	
	Review of Schools Forum Constitution	Ian Hughes	Consultation / Decision	
	High Needs Block Recovery Plan for DfE and Capital Planning and Hub Model Report	David Graham	View/Information	

Meeting date	Reports	Officer	Report for:	Deadline for papers
	Early Years Funding Formulae and Centrally Retained Funds 2024/25 Report	Martyn Sharples	View/Decision	
	Approval of Central Block Expenditure for 2024/25 Report	Steve Drake Martyn Sharples	Decision	
	De-delegation of School Improvement Report	Connie Beirne	Decision	
	Update on Schools Rebuilding Programme Report	Richard Morse	View/Information	
Meeting 25th April 2024	De-Delegation of Unions Facility Fees Report	Kevin Rivett Lisa Davies	Update / Clarification	10 th April 12pm
	Union Facilities figures to ESFA Update (increase or decrease)	Jane Davy	Update / Clarification	
	DSG Management Plan Report (Termly Review)	David Graham Victoria Coyle	Update / Clarification	
	Calderdale CSSB Funded Statutory Services for Schools / Allocation of 2024/25 Central School Services Block (CSSB)	Steve Drake Martyn Sharples	Decision	
	School Balances Spring Report 2024	Jane Davy	View/Information	
	Update on Schools Rebuilding Programme Report (brought forward from Januarys meeting)	Richard Morse	View/Information	
	Review of Schools Forum Constitution	Ian Hughes	Consultation / Decision	

Meeting date	Reports	Officer	Report for:	Deadline for papers
Meeting 27th June 2024	Review of Schools Forum Constitution including an update on the CMBC Schools Academic Year 24/25 (Maintained/Academy)	Ian Hughes	Consultation / Decision (verbal)	Deadline 12 th June 12pm
	DSG Management Plan Report (Termly Review) / update on the High Needs group	David Graham Victoria Coyle	Update / Clarification	
	Capital Projects and Expansion of Special Schools	David Graham Victoria Coyle	Update / Clarification	
	Update on Schools Rebuilding Programme	Richard Morse	Update / Clarification (Verbal)	
	Additional Funding allocation to School Clusters June 2024	Connie Beirne	Consultation / Decision	
	The issue of Schools Forum voting on clawback of significant school balances	Jane Davy	Clarification (Verbal)	
	School Balances as at 31 March 2024 & Future Budget Plans	Jane Davy	View/Information	