

Schools Forum

Date: 14 November 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/az/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

Vacant

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)
	Phillip Hannah (The Whitley AP Academy)
	Stephen Baines (Trinity MAT)
	Stuart Hillary (Park Lane)
	Rachel Harling (St Augustines)
Academy Bursar x2	Ivan Kuzio (Trinity MAT)
	Adam McNichol (Hebden Royd)
Roman Catholic	Brenda Monteith (Highbury School)
Church of England	Vacant
Calderdale Federation of Education Staff Unions	Hamish Heald (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 27 June 2024**
5. **Election of Chair and Vice Chair**
Decision **Karen Morley**
6. **Review of Schools Forum Constitution including an update on the CMBC Schools Academic Year 24/25 (Maintained/Academy)**
Verbal - Consultation / Decision **Ian Hughes**
7. **Education Function for Maintained Schools - Health & Safety funding request**
Decision **Paul Greenwood**
Lee Broadbent
8. **Education Function for Maintained Schools - Governor Support funding request**
Decision – move up the agenda **Debby Simpson**
Martyn Sharples
9. **Indicative Schools Funding Formula 2025-26**
Consultation **Jane Davy**
10. **Growth Fund**
Decision **Jane Davy**
11. **Falling Rolls Fund**
Decision **Jane Davy**
12. **Proposed School Block Transfer 2025-26**
Decision **Jane Davy**
Emma Ingham

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| <p>13. DSG Management Plan Report (Termly Review)
Update / Clarification</p> | <p>Victoria Coyle
Emma Ingham</p> |
| <p>14. De-Delegation of School Improvement Functions (Maintained Schools)
Decision</p> | <p>Connie Beirne</p> |
| <p>15. De-Delegation of Union Facilities Funding 2025-26
Decision</p> | <p>Jane Davy
Hamish Heald</p> |
| <p>16. Options Paper on Contingency Fund and Calderdale Headteachers Health and Wellbeing strategy 2025-2028
Decision</p> | <p>Connie Beirne</p> |
| <p>17. Scheme for Financing Schools (Maintained Schools) LMS core library - LMS legislation - All Documents
Verbal - Consultation / Decision</p> | <p>Jane Davy</p> |
| <p>18. 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.</p> | <p>Chair</p> |
| <p>19. Future Dates

16 January 2025
24 April 2025
3 July 2025

All meetings will start at 4pm
Venue: Virtual Teams Meeting</p> | <p>Jemima Flintoff</p> |

CALDERDALE SCHOOLS FORUM
27 June 2024 – Virtual Meeting Via Teams

PRESENT:

Tony Guise (Secondary Maintained) – Chair
Karen Morley (Academy) – Co Vice Chair
Mungo Shepherd (Primary Maintained)
Lauren Watson (Primary Maintained)
Brenda Monteith (Roman Catholic)
Adam McNichol (Academy Bursar)
Kevin Rivett (Unions)
Louise Downing (Primary Governors Maintained)
John Eccleston (Academy Primary Governor)
Gill Shirt (Secondary Governor Maintained)
Lisa Davies (Unions)
Stephen Baines (Academy Secondary)
Stuart Hillary (Academy Secondary)
Ivan Kuzio (Academy Bursar)
Karl Veltman (Post 16 Representative)
Debbie Sweet (Special School)
Dan Burns (Academy Primary)

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)
Connie Beirne (Interim Service Manager for Early Years and School Strategy and Performance)
Amanda Farron (Senior Finance Officer - Observing)
Adele Lockwood (Youth Justice Service Officer - Observing)
Emma Ingham (SEND & Inclusion Service Manager - Observing)

APOLOGIES

Phil Hannah (Academy AP)
Cllr Wilkinson (Cabinet Member – Observing)
Andrea Dyson (Early Years Rep)
Denise Gwizdak (Early Years Rep)
Gareth Morris Ferney Lee (Primary Governors Maintained)
Ian Hughes (Legal Officer)
Richard Horsfield (Academy Secondary)
Alice Leadbitter (Primary Head Teacher Substitute)
Brian Robson (Academy Secondary)
Martyn Sharples (Finance Officer)

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

None

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.

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.

Amanda Farron – Senior Finance Officer

Adele Lockwood – Youth Justice Service Officer

Emma Ingham – SEND & Inclusion Service Manager

4. **Minutes of the Schools Forum held on 25 April 2024**

Item 5 – Jane Davy was not required to attend ESFA due to the change being internal. The de-delegation stays until the 1st January 2025.

Item 7 – The Chair Q: What was the amount of clawback for the last financial year? £400k

Item 8 – Karen Morley Q: What is the breakdown of £451,560 from the CSSB report and can job descriptions be circulated? Kirsty Davison to circulate.

The minutes were agreed by members of Schools Forum.

5. **Review of Schools Forum Constitution including:**

- **Proposal from Debby Simpson on Academy positions on Schools Forum**

Over the last year Debby Simpson has on numerous occasions tried to fill the Academy positions for you as agreed when Jeannine Houshmand was working for the LA. Although we have had a good response this time, there is still one position for an Academy Bursar left vacant. Adam McNichol who is a primary governor at Hebden Royd did want a position but there were no primary governors free.

Adam was previously on Schools Forum as a primary governor at a maintained school but as Hebden Royd is no longer maintained he can only apply for an academy category.

Debby Simpson therefore has asked that the Forum agree to accept the Academy Bursar position for a term of 3 years. After the 3 years the position will then be advertised back as an Academy Bursar vacancy.

Academy members vote:

7 approve

0 oppose

The Chair needs to review constitution with Ian Hughes in a separate meeting before the autumn term.

- **An update on the CMBC Schools Academic Year 24/25 (Maintained/Academy) -**
This item will be added to the workplan for the next school year and brought back to the Schools Forum meeting in November.

6. DSG Management Plan Report (Termly Review) / update on the High Needs Block Group

The most recent meeting with the ESFA was positive and they are comfortable with the processes the local authority putting in place to make ourselves accountable. They accept the financial situation will undoubtedly become worse before it improves. Calderdale does not meet the criteria for the 'Safety Valve Programme' and this has now been closed to new agreements. The ESFA will advise the local authority on the deficit plan and this will update the action plan. The local authority deficit next year could be as high as £12 million. The ESFA advised if the local authority require another transfer, this should be actioned in September to allow for decision making to be made early. The Chair suggested this be drafted into the work plan for the future meeting and was pleased there is adequate Schools Forum representation at the HNB Deficit Reference Groups. Debbie Sweet is unable to fulfil her role at the group meaning there is a need for Special School representation. The Chair and Debbie are happy for David Graham to approach the Special School Cluster to broker representation.

7. Capital Projects and Expansion of Special Schools

Following on from the cabinet meeting in January, the local authority have been pursuing strategic interventions around an additional resource provision which is to commence from January 2025 for 2 years. After discussions with Ravenscliffe governors and their management, Ravenscliffe felt unable to support the local authority in relation to the building of a new campus in North Halifax. The proposal will go back to cabinet to establish an academy free school as an expansion route. There is a full classroom build happening at Ravenscliffe, a proposed building programme for Woodbank and expansion at Highbury. There is also a focus on process and capital commitment at establishing the new free school, subject to cabinet approval. The Capital budget is £23 million and this will be spent over the next year with a hope that special school planning will receive extra funding going forward.

Unfortunately, there is a limited resource. The majority of spending will be to build the new special school at North Halifax. Local authority officers are also continuing to explore possibilities for the expansion of Highbury school.

John Eccleston is concerned given the challenges schools are experiencing. They are trying to bridge the gap between special provision and maintained school provision. He understands there is a very serious need for a new special school.

Paul Tinsley advised proposals in terms of direction and priorities are taken to the Calderdale Strategic Partnership for SEND Board. The AP free school is a free provision offered to us from the DfE and the local authority only have to provide the commissioning of places. There are also plans to make it a through school. Updates from the board can be provided to forum.

The Chair Q: Why is the new AP Free School in partnership with Delta and not locally? Does this mean applications will be in conjunction with the external provider?

Paul advised the local authority were invited by DfE to bid for the free school. After visiting one of the AP Free Schools in Doncaster, he felt it was a strong model and would benefit Calderdale. Paul confirmed the local authority would like to have a local provider for the new SEN Provision.

Richard Morse informed forum that part of the process is presenting a business case to the DfE and it is treated as a competition against other local authorities. He feels there is no reason as to why the school could not be managed locally. The local authority will build the school and DfE will decide who manages it. Overall, it will be a 12-month process to find out who we would be working with. A desktop exercise has been completed to determine how much space we will need to accommodate for the provision.

Adam McNichol Q: Why wasn't there an open procurement process?

Richard advised the local authority wanted to work with Ravenscliffe but there was no agreement finalised due to the new provider. This would have seen a new building on the site and on a split site arrangement. The DfE arranged for the competition of the school to be run nationally.

The Chair Q: I assume this will not be coming out of the £23 million budget?

Richard confirmed the £23 million is available to support more specialist places and most of this will be used to fund the new special school in North Halifax. Anything left will fund ARPs and expansion of Highbury and Woodbank for example. It costs about £100k per pupil place to build a new special school.

David added that in terms of appointing a partner to run the school, he has been involved in the process with another authority. There is a shortlisting exercise which he felt collegiate with this and hopes it will be the same for Calderdale.

8. Update on Schools Rebuilding Programme Report

Castle Hill is part of the SRP. The planning application is now submitted for the new build and all information can be accessed on the planning portal. There have been some challenges with the temporary site of the modular school however, the DfE are pleased with the way colleagues have worked together. Richard received an email thanking local authorities contribution which he can share with Schools Forum. The local authority are working with DfE colleagues for the next round of schools in April 2025 and school visits completed. A case was made around the conditions of some schools to allow them to be brought forward in the programme which was well received by DfE due to the health and safety concerns.

The Chair wanted to give a special mention to Mungo and the new Ash Green site opening on 10th July, the first new carbon neutral school in Calderdale. From Monday morning, KS2 will be in their new classrooms. Mungo is looking forward to pupils returning and wanted to commend the support from local officers, especially Richard Morse, Rob Fox and Paul Tinsley. Mungo invited forum members to come view the new school if they wish.

9. Additional Funding allocation to School Clusters June 2024

The key points are that the money benefits all children in Calderdale, for colleagues to work together for the benefit of children, the sharing of good practice, to offer support and monitor the challenges. It is important the funding helps the smaller and more vulnerable schools such as those in the Calder Valley cluster. If there is an approval of the £73k, there would only be a shortfall of 25k compared to the funding provided last year.

The Chair Q: If Schools Forum do not allocate the money to the clusters, will there be a deficit?

Connie confirmed if the additional funding is approved, the shortfall wouldn't have as much of an affect.

The Chair: Could the £73k be ring fenced for potential emergencies and if so, what would be the process for how schools access it?

Jane advised that she cannot provide an answer for this and felt this is a forum decision for the Chair to agree on how they local authority use the money.

Mungo Shepherd Q: I thought the £73k was going to be split between the clusters to pay off the losses for each cluster?

Connie confirmed there are two lots of £73k, one for school clusters and one for potential emergencies.

The Chair Q: Would it be better to hold on to 146k money until the next academic year to support the falling rolls fund rather than emergencies?

Jane advised the funding for falling rolls comes from a separate block of money.

Vote to approve £73k for clusters and hold the remaining £73k to allocate for a specific project:

Approve 14

Oppose 0

The remaining £73k to be ring fenced and voted on at the November meeting.

10. Issues of Schools Forum voting on clawback of significant school balances

Jane advised this is covered in the report for item 11.

11. School Balances as at 31 March 2024 & Future Budget Plans

Jane Davy Q: Would Schools Forum want to suspend the balance control mechanism for clawback that was introduced in 2011?

Mungo felt everyone would prefer that the clawback mechanism be kept in place due to the uncertainty around financial costs and budgets in schools.

John expressed his concern around the effect the shortage of money is having on children's education.

Vote for maintained school representatives on continuing the balance control mechanism for another year:

Approve 5

Oppose 0

12. Any Other Business

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

CalderdaleSchoolsForum@calderdale.gov.uk

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13. Future Dates

14 November 2024

16 January 2025

24 April 2025

3 July 2025

All meetings will start at 4pm

Venue: virtual Teams Meeting

Report to Schools Forum

Item	7
Meeting Date	14 November 2024
Subject	Education Function for Maintained Schools – Health & Safety funding request
Report Author	Lee Broadbent / Paul Greenwood

Report purpose
To seek approval of Schools Forum Maintained schools' representatives for funding for Health and Safety Support Service for maintained schools only for 2025/26.

Need for consideration
N/A

Need for decision
The Local Authority has statutory responsibilities for maintained schools which are funded from maintained school's budgets only, with agreement of the maintained schools members of schools forums.

Contact Officers
Lee.Broadbent@calderdale.gov.uk Paul.Greenwood@calderdale.gov.uk

1. Background information and context

The Local Authority has statutory responsibilities for maintained schools which are funded from maintained school's budgets only, with agreement of the maintained schools members of schools forums.

The relevant maintained schools' members of the schools forum (primary, secondary, and special,) should agree the amount the local authority will retain.

If the local authority and schools forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

The DfE has published an [operational guide](#) setting out how the funding can be spent.

2025/26 cost of meeting Health and Safety duties: £ 41,377

Statutory duties for Maintained schools:

Compliance with duties under Health and Safety at Work Act (1974) (Sch 2, 70) and other associated legislation.

- Competent advice from the Council's Health and Safety team.
- Ad-hoc visits for monitoring purposes.
- Formal audit and inspection in line with current schedule.
- Accident investigations for RIDDOR reportable accidents.
- Health and Safety policy and appropriate information to manage the school effectively.
- Health and Safety training to meet minimum statutory induction and other training needs.
- Monitoring of fire safety as required by the Concordat between Council and WYFRS.
- Support for managing and monitoring the schools Premises Asbestos Management Plan (PAMP).
- Access to Radiation Protection Officer and Radiation Protection Adviser (Secondary only).

The duties outlined above are fulfilled by the Council's Health and Safety team.

2. Main issues for Schools Forum

- a) The LA's business planning process identifies the statutory, discretionary and traded elements of each service together with their full-cost so funding can be properly appropriated. To ensure the LA's statutory duties are not subsidised from other funding sources, the costs of support services are attributed in the

business planning process. We are therefore confident the services are achieving full-cost recovery.

- b)** The services, and their estimated costs of meeting statutory duties for 2025/26, are contained in the report.

3. Recommendations

Schools Forum approve the allocation of £41,377 from the Primary and Secondary Maintained Schools Budget for 2025/26 to fund the cost of Health and Safety Support Services to deliver statutory responsibilities for the maintained schools only.

4. Reasons for recommendations

Contained in the report

5. Impact of funding, targets, and milestones

Contained in the report

6. Resource implications

The cost of Health and Safety Support Services meeting the statutory duties for Maintained schools, for 2025/26, is £41,377.

7. Appendices

Appendix 1. Extracts from the Schools Operational Guidance 2024 to 2025

Appendix 1

Extracts from the Schools Operational Guidance: 2024 to 2025 (updated 1 August 2024)

35. Services for maintained schools

Local authorities can fund some services relating to maintained schools only from maintained school budget shares, with the agreement of maintained school members of the schools forum.

The relevant maintained schools members of the schools forum (primary, secondary, special, and PRUs) should agree the amount the local authority will retain.

If the local authority and schools forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

Local authorities should set a single rate per 5 to 16-year-old pupil for all mainstream maintained schools, both primary and secondary. In the interests of simplicity, this should be deducted from basic entitlement funding.

The department will not allow adjustments to other factors, and the rate will not include early years or post-16 pupils, who are funded through different formulae.

Local authorities can choose to establish differential rates for special schools and PRUs if the cost of fulfilling the duty is substantially different for these schools. The rate will be expressed per place rather than per pupil for special schools and PRUs (the multipliers used in the CSSB predecessor grant previously were 3.75 for PRUs and 4.25 for special schools).

As with de-delegation (see [de-delegated services](#) section below), the amount to be held by the local authority will be determined after MFG has been applied. If a school converts to academy status, the department will recoup the amount retained for that school from the local authority's DSG for the remaining months of the financial year that the school is an academy. The academy will be reimbursed in its monthly general annual grant payment from the point of conversion.

Unlike for de-delegated services, there will be no phased transfer of funding following conversion so there will be immediate recoupment of this part of the budget. For example, if a school converts on 1 January 2025 (3 months prior to the end of the financial year), the department will recoup three-twelfths of the retained amount relating to that school.

Local authorities can fund some administrative functions, relating to maintained schools out of the DSG, with the agreement of either the schools forum or the Secretary of State. For expenditure to be funded out of the DSG, it has to be defined as part of the Schools Budget. This definition is set out in the annually made school finance regulations.

As an alternative, local authorities may not wish to fund these administrative functions out of the DSG, but to fund them out of general funds.

There are now 2 routes for local authorities to follow, depending on whether they want to ask the schools forum to authorise funding of any part of these functions from the DSG, or whether they want to use general funds.

If they want to use the DSG, local authorities can request schools forum approval as set out in the school finance regulations; and if the schools forum does not agree they can request permission from the Secretary of State.

If a local authority wants to use general funds, it will make a deduction as set out in the school finance regulations without approaching the schools forum. In that case the expenditure ceases to be part of the Schools Budget and therefore cannot be funded out of the 2024 to 2025 DSG. Instead, it is treated as part of the non-schools education budget and falls to be funded out of the local authority's general funds.

Local authorities should provide sufficient evidence to their schools forum to enable them to make an informed decision on the amount of funding to be held centrally. This could include:

- planned total spending for 2024 to 2025 on each of the headings set out in [annex 4: schools forum approvals for centrally held funding](#), which also covers all central expenditure
- spending shown to at least the level of detail provided in the 2024 to 2025 section 251 budget statement
- comparable figures for previous years' spending, split where relevant between those relating to all schools, and those for maintained schools only
- consequences for the funding and delivery of each of the services provided, if the request was not approved
- the impact on individual school budgets and their overall financial position
- the impact on the local authority if the amount was not held centrally
- detail of the results of the equalities impact assessment carried out to assess the impact of the central retention/education functions of the funding on children or other people who have one or more of the protected characteristics under the Equality Act 2010

50. Annex 3: central services that may be funded with agreement of schools forum

The split of services between responsibilities that local authorities hold for all schools, and those that relate to maintained schools only are shown below.

Responsibilities held by local authorities for all schools are funded from the central school services block, with the agreement of schools forums or the Secretary of State.

Responsibilities held by local authorities for maintained schools only are funded from maintained schools budgets only, with agreement of the maintained schools members of schools forums.

The department has included references to the relevant schedules in the annually updated school finance regulations. These provisions will be replicated in the regulations we make for the 2024 to 2025 funding year.

50.1 Responsibilities held for all schools

Statutory and regulatory duties

- Director of children's services and personal staff for director (Schedule 2, paragraph 15a)
- planning for the education service as a whole (Schedule 2, paragraph 15b)
- authorisation and monitoring of expenditure not met from schools' budget shares (Schedule 2, paragraph 15c)
- formulation and review of local authority schools funding formula (Schedule 2, paragraph 15d)
- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of the Local Government Act 1972 except duties specifically related to maintained schools (Schedule 2, paragraph 15e)
- consultation costs relating to non-staffing issues (Schedule 2, paragraph 19)
- plans involving collaboration with other local authority services or public or voluntary bodies (Schedule 2, paragraph 15f)
- standing Advisory Committees for Religious Education (SACREs) (Schedule 2, paragraph 17)
- provision of information to or at the request of the Crown other than relating specifically to maintained schools (Schedule 2, paragraph 21)
- revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Schedule 2, paragraph 22)

Education welfare

- functions in relation to school attendance (Schedule 2, paragraph 16)
- responsibilities regarding restrictions on the employment of children (Schedule 2, paragraph 18)
- functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Schedule 2, 20)

Asset management

- management of the local authority's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Schedule 2, paragraph 14a)
- landlord responsibilities, including those in relation to land leased to academies for schools (Schedule 2, paragraph 14b)

Other ongoing duties

- licences negotiated centrally by the Secretary of State for all publicly funded schools (Schedule 2, paragraph 8); this does not require schools forum approval
- operation of the system of admissions and appeals (Schedule 2, paragraph 9)
- fees or expenses payable in connection with the attendance of non-SEN pupils at schools not maintained by any local authority (Schedule 2, paragraph 10)
- remission of boarding fees at maintained schools and academies (Schedule 2, paragraph 11)

- servicing of schools forums (Schedule 2, paragraph 12)
- back-pay for equal pay claims (Schedule 2, paragraph 13)
- writing to parents of year 9 pupils about schools with an atypical age of admission, such as UTCs and studio schools, within a reasonable travelling distance (Schedule 2, paragraph 23)

Historic commitments

- capital expenditure funded from revenue (Schedule 2, paragraph 1)
- prudential borrowing costs (Schedule 2, paragraph 2(a))
- termination of employment costs (Schedule 2, paragraph 2(b))
- contribution to combined budgets (Schedule 2, paragraph 2(c))
- special educational needs transport costs (Schedule 2, paragraph 2(d))

50.2 Responsibilities held for maintained schools only

School improvement

- expenditure related to core school improvement activities of local authorities with respect to maintained schools (Schedule 2, paragraph 53)

Statutory and regulatory duties

- functions of local authority related to best value and provision of advice to governing bodies in procuring goods and services (Schedule 2, paragraph 58)
- authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Schedule 2, paragraph 59)
- monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Schedule 2, paragraph 60)
- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of the Local Government Act 1972 for maintained schools (Schedule 2, paragraph 61)
- functions under regulations made under section 44 of the Education Act 2002 (Consistent Financial Reporting) in so far as the functions related to maintained schools (Schedule 2, paragraph 62)
- investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Schedule 2, paragraph 63)
- functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Schedule 2, paragraph 64)
- HR duties, including advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Schedule 2, paragraph 65)
- determination of conditions of service for non-teaching staff (Schedule 2, paragraph 66)
- appointment or dismissal of employee functions (Schedule 2, paragraph 67)
- consultation costs relating to staffing (Schedule 2, paragraph 68)

- compliance with duties under Health and Safety at Work etc Act 1974 (Schedule 2, paragraph 69)
- provision of information to or at the request of the Crown relating to maintained schools (Schedule 2, paragraph 70)
- school companies (Schedule 2, paragraph 71)
- functions under the Equality Act 2010 (Schedule 2, paragraph 72)
- establish and maintaining computer systems, including data storage (Schedule 2, paragraph 73)
- appointment of governors and payment of governor expenses (Schedule 2, paragraph 74)
- budgeting and accounting functions relating to maintained schools (Schedule 2, paragraph 75)
- retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Schedule 2, paragraph 77)

Education welfare

- inspection of attendance registers (Schedule 2, paragraph 80)

Asset management

- general landlord duties for all maintained schools (Schedule 2, paragraphs 78a & b (section 542(2)) Education Act 1996; School Premises (England) Regulations 2012) to ensure that school buildings have:
 - appropriate facilities for pupils and staff (including medical and accommodation)
 - the ability to sustain appropriate loads
 - reasonable weather resistance
 - safe escape routes
 - appropriate acoustic levels
 - lighting, heating, and ventilation which meets the required standards
 - adequate water supplies and drainage
 - playing fields of the appropriate standards
 - general health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974)
 - management of the risk from asbestos in community school buildings
 - Control of Asbestos Regulations 2012

Central support services

- clothing grants (Schedule 2, paragraph 54)
- provision of tuition in music, or on other music-related activities (Schedule 2, paragraph 55)
- visual, creative, and performing arts other than music (Schedule 2, paragraph 56)
- outdoor education centres (but not centres mainly for the provision of organised games, swimming, or athletics) (Schedule 2, paragraph 57)

Premature retirement and redundancy

- dismissal or premature retirement when costs cannot be charged to maintained schools (Schedule 2, paragraph 79)

Monitoring national curriculum assessment

- monitoring of National Curriculum assessments (Schedule 2, paragraph 76)

Therapies

- this is now covered in the high needs section of the regulations and does not require schools forum approval

Additional note on central services

Services set out above will also include administrative costs and overheads relating to these services (regulation 1(4)) for:

- expenditure related to functions imposed by or under chapter 4 of part 2 of the School Standards and Framework Act 1998 (financing of maintained schools), the administration of grants to the local authority (including preparation of applications) and, where it is the local authority's duty to do so, ensuring payments are made in respect of taxation, national insurance, and superannuation contributions
- expenditure on recruitment, training, continuing professional development, performance management and personnel management of staff who are funded by expenditure not met from schools' budget shares and who are paid for services
- expenditure in relation to the investigation and resolution of complaints
- expenditure on legal services.

51. Annex 4: schools forum approvals for centrally held funding

A number of the services that are covered by funding that is held centrally are subject to a limitation of no new commitments or increases in expenditure from 2023 to 2024.

This limit does not apply to admissions or the servicing of schools forums.

Schools forum approval is required each year to confirm the amounts on each line.

When using centrally held funding, local authorities must treat maintained schools and academies on an equivalent basis.

The following sections set out the level of approval required for each centrally retained service.

Where schools forum approval is not provided, the local authority can apply to the Secretary of State to decide.

51.1 Schools forum approval is not required (although they should be consulted)

- high needs block provision
- central licences negotiated by the Secretary of State
- funding of brought forward deficits

51.2 Schools forum approval is required on a line-by-line basis

- funding to enable all schools to meet the infant class size requirement
- back pay for equal pay claims
- remission of boarding fees at maintained schools and academies
- places in independent schools for non-SEN pupils
- admissions
- servicing of schools forum
- contribution to responsibilities that local authorities hold for all schools
- contribution to responsibilities that local authorities hold for maintained schools (voted on by relevant maintained school members of the forum only)
- de-delegated services from the schools block (voted on by the relevant maintained school members of the forum only)

51.3 Schools forum approval is required

- central early years block provision
- any movement of funding out of the schools block

51.4 Schools forum approval is required on a line-by-line basis – the budget cannot exceed the value agreed in the previous funding period, and no new commitments can be entered into

- capital expenditure funded from revenue:
 - projects must have been planned and decided on prior to April 2013; no new projects can be charged
 - details of the remaining costs should be presented
- contribution to combined budgets:
 - where the schools forum agreed prior to April 2013 a contribution from the schools budget to services which would otherwise be funded from other sources
- existing termination of employment costs
 - costs for specific individuals must have been approved prior to April 2013; no new redundancy costs can be charged
- prudential borrowing costs:
 - the commitment must have been approved prior to April 2013
 - details of the remaining costs should be presented
- SEN transport where the schools forum agreed prior to April 2013 a contribution from the schools budget (this is now treated as part of the high needs block but still requires schools forum approval as a historic commitment)

51.5 Schools forum approval is required on a line-by-line basis, including approval of the criteria for allocating funds to schools

- funding for significant pre-16 pupil growth, including new schools set up to meet basic need, whether maintained or academy
- funding where SCAP shows that school places will be required in the subsequent 3 to 5 years

Report to Schools Forum

Item	8
Meeting Date	14 November 2024
Subject	Education Function for maintained schools - Governor Support funding request
Report Author	Martyn Sharples / Debby Simpson

Report purpose

To seek approval of Schools Forum Maintained schools' representatives for funding for Calderdale Governor Support Service for maintained schools only for 2024/25

Need for consideration

N/A

Need for decision

The Local Authority has statutory responsibilities for maintained schools. This is funded from maintained schools budgets only, with agreement of the maintained school members of schools forum.

Contact Officers

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1. Background information and context

The Local Authority has statutory responsibilities for maintained schools which are funded from maintained schools' budgets only, with agreement of the maintained schools members of schools forums.

The relevant maintained schools members of the schools forum (primary, secondary, special, and PRUs) should agree the amount the local authority will retain.

If the local authority and Schools Forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

The DfE has published an [operational guide](#) setting out how the funding can be spent.

Calderdale Governor Support Service delivers services to meet the following LA statutory responsibilities for maintained schools only:

Under Section 22 (Sch2, 59, Sch2, 79) of the Education Act 2002 to:

- Provide information and training to maintained school governors free of charge
- Appoint parent governor representation to local authority education committees
- Nominate LA governors to all maintained school governing bodies
- Set up temporary governing bodies for new maintained schools

The LA fulfils the statutory duties, in a) above, by providing access to Basic NGA membership and on-line training, for all Maintained schools. In the 2023/24 academic year this was provided for 47 governing bodies.

The duties, outlined in b) c) and d) above, are fulfilled by the Governor Support Officer.

2. Main issues for Schools Forum

- a) The LA's business planning process identifies the statutory, discretionary and traded elements of each service together with their full-cost so funding can be properly appropriated. To ensure the LA's statutory duties are not subsidised from other funding sources, the costs of support services are attributed in the business planning process. We are therefore confident the services are achieving full-cost recovery.

- b) The services, and their estimated costs of meeting statutory duties for 2025/26, are contained in the report

3. Recommendations

Schools Forum is asked to support the recommended allocation of £17,481 from the Primary and Secondary Maintained Schools Budget for 2025/26 to fund the cost of Calderdale Governor Support Services to deliver statutory responsibilities for the maintained schools only.

4. Reasons for recommendations

Contained in the report

5. Impact of funding, targets, and milestones

Contained in the report

6. Resource implications

The cost of Governor Support Services meeting the statutory duties for Maintained schools, for 2025/26, is £17,481.

7. Appendices

Appendix 1. Extracts from the Schools Operational Guidance 2024 to 2025

Appendix 1. Extracts from the Schools Operational Guidance: 2024 to 2025 (updated 1 August 2024) 35. Services for maintained schools

Local authorities can fund some services relating to maintained schools only from maintained school budget shares, with the agreement of maintained school members of the schools forum.

The relevant maintained schools members of the schools forum (primary, secondary, special, and PRUs) should agree the amount the local authority will retain.

If the local authority and schools forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

Local authorities should set a single rate per 5 to 16-year-old pupil for all mainstream maintained schools, both primary and secondary. In the interests of simplicity, this should be deducted from basic entitlement funding.

The department will not allow adjustments to other factors, and the rate will not include early years or post-16 pupils, who are funded through different formulae.

Local authorities can choose to establish differential rates for special schools and PRUs if the cost of fulfilling the duty is substantially different for these schools. The rate will be expressed per place rather than per pupil for special schools and PRUs (the multipliers used in the CSSB predecessor grant previously were 3.75 for PRUs and 4.25 for special schools).

As with de-delegation (see [de-delegated services](#) section below), the amount to be held by the local authority will be determined after MFG has been applied. If a school converts to academy status, the department will recoup the amount retained for that school from the local authority's DSG for the remaining months of the financial year that the school is an academy. The academy will be reimbursed in its monthly general annual grant payment from the point of conversion.

Report to Schools Forum

Item	9
Meeting Date	14 November 2024
Subject	Indicative School Funding 2025-26
Report Author	Jane Davy

Report purpose

To consult members of Schools Forum with the latest proposals for school funding for 2025/26 based on the DfE 2024-25 Operational Guidance and information provided to the LA on 4th October 24.

Background Information

The LA will still calculate local formulae for 25/26 in accordance with the DfE's Operational Guidance (once published).

The DfE have confirmed that for 2025-26 schools NFF will use the same factors as the 2024 to 2025 NFF and continue to provide funding protections; minimum per pupil levels and minimum funding guarantee. They have also confirmed the following

- Rolling the teachers pay additional grant (TPAG) and the teachers pension employer contribution grant (TPEG) 2024 into the 25/26 schools NFF.
 - i) For TPAG and TPEG the funding rolled into the NFF will be the published funding rates
 - ii) For CSBG, this will be a slightly different approach due to the funding needs to meet the full year cost of the support staff pay award as well as the part year cost of the 2024 teachers pay award (from Sept 24). The ESFA will calculate the new (higher) full year equivalent funding rates from this new total and these cash values will be rolled into the 25/26 NFF
- Minor technical adjustments will be made to the operation of the minimum funding guarantee (MFG), whereby both split sites and PFI funding will be excluded from the MFG calculation. This brings the treatment of these factors in line with the NFF and ensures that increases or decreases in a schools split site and/or PFI funding does not impact other aspects of their funding.

Need for consideration

Without the indicative NFF data, it is not known what the individual NFF factors will be. LA officers are proposing that Calderdale will adopt the formula factors used in the NFF, the values used to calculate the school block allocation will depend upon the School Forum Members decision on the transfer of 0.5% Schools Block to High Needs Block.

For the purpose of this paper officers have calculated an indicative NFF based on a 2% increase of all factors plus rolling in the TPAG and the TPEG, the CSBG is not included due to lack of information on how the grant will be “grossed up” for the NFF. Therefore, please note that the values shown below will be less than the actual figures once published.

Factor	24/25 LA Funding Formula Values	25/26 estimated national funding formula values
Primary basic entitlement	3,549.92	3,773.60
KS3 basic entitlement	5,005.00	5,319.15
KS4 basic entitlement	5,642.00	5,996.54
Primary FSM	490.08	499.88
Secondary FSM	490.08	499.88
Primary FSM6	820.14	956.90
Secondary FSM6	1,200.20	1,404.75
Primary IDACI F	235.04	239.74
Primary IDACI E	285.05	290.75
Primary IDACI D	445.08	453.98
Primary IDACI C	485.08	494.78
Primary IDACI B	515.09	525.39
Primary IDACI A	680.12	693.72
Secondary IDACI F	340.06	346.86
Secondary IDACI E	450.08	459.08
Secondary IDACI D	630.11	642.71
Secondary IDACI C	690.12	703.92
Secondary IDACI B	740.13	754.93
Secondary IDACI A	945.16	964.06
Primary EAL3	590.10	601.90
Secondary EAL3	1,585.27	1,616.98
Primary LPA	1,170.20	1,193.60
Secondary LPA	1,775.30	1,810.81
Primary mobility	960.16	979.36
Secondary mobility	1,380.23	1,407.83
Primary lump sum	134,422.85	142,319.42
Secondary lump sum	134,422.85	142,319.42

Primary sparsity	57,109.71	58,251.90
Secondary sparsity	83,014.11	84,674.39
All-through sparsity	83,014.11	84,674.39
Split sites basic eligibility	53,709.13	54,783.31
Split sites distance	26,904.57	27,442.64

Split Site

This will follow the NFF values 4 schools qualify for basic eligibility funding, 3 schools qualify for the full distance funding rate and 1 school qualifies for a tapered amount.

Capping

In line with meeting the DfE's intention to address historic underfunding and move to a system where funding is based on need the LA propose not to introduce a cap if it is affordable to do so.

MFG

It is proposed to set MFG at the highest level possible up to the maximum of 0.5% allowed under the regulations.

Disapplication requests.

MFG Disapplication; Local Authorities can apply for disapplication to MFG where application will lead to significant inappropriate levels of protection.

Modelling on 2023 data and expected Sept 24 pupil numbers indicates Halifax Academy would not qualify for MFG and would be over protected by £5.78 per pupil and Calder High would not qualify for MFG. However, calculations show that Calder High would be over protected by £11.70 per pupil if MFG has to be applied once the Oct 2023 data is applied.

Modelling on 2023 data indicates that the two through schools do not currently qualify for MFFL.

The schools have been consulted in writing and asked for objections to by 8 November 2024. A verbal update will be given at the meeting, it is expected no objections will be received. The LA will apply for the disapplication by the deadline of the 15th November 2024, Forum Members will be updated on the result of the request at the January 2025 meeting

Modelling

The funding formula has been modelled on October 23 data, Option 1 is the impact of moving 0.5% to the high needs block and Option 2 is the impact of following the NFF values. The impact of this can be found in Appendix A.

In summary modelling shows;

Option 1

The funding has been calculated by reducing the basic entitlement factor by £29.60 for primary, £39.35 and £42.72 for KS3 and KS4 respectively to fund the 0.5%. If Calderdale receive funding through growth and falling rolls factors and if School Forum agree, this will be used first before reducing any factors of the NFF.

Modelling shows, 1 school would remain on MFG and as a minimum receive 0.5% increase per pupil. MFG disapplication would not be required. However, more schools may qualify when final data is applied. 5 Schools would receive funding under the mandatory minimum funding level factor. MFFL disapplication would not be required. However, one school may qualify when final data is applied.

Option 2

Modelling shows 1 school would remain on MFG and as a minimum receive 0.5% increase per pupil. MFG disapplication would not be required. However, one school may qualify when final data is applied. 5 Schools would receive funding under the mandatory minimum funding level factor. MFFL disapplication would not be required. However, one school may qualify when final data is applied .

In addition the LA would like to increase the PFI factor of the funding formula by approx. £13k, this hasn't been modelled but it is expected to be a reduction of approx. 40p per pupil based on the current pupil numbers. The rationale for this request is to bring the funding back in line with the current affordability gap. Each year the funding for PFI increases with inflation index as per the ESFA and this has fallen slightly behind the actual inflation applied to the PFI contract. Consultation with schools is not required as it is not a change to the formula. However, School Forum members are being consulted and asked for their views.

If when running the actual October 2024 data in the formula any the excess funding will be allocated to the basic entitlement factor for both sectors up to the allowable maximum value, followed by FSM over 6 and the lump sum. However, if it found there is a shortfall of funding the formula will be adjusted, in the following order;

- 1) Basic Entitlement to the minimum value allowed
- 2) Reduce MFG (but no lower than +0%)
- 3) Introduce capping for gaining schools (except those schools who would gain through receiving MFFL funding).

Consultation with schools

The Local Authority has a requirement to consult with both maintained schools and academies on the changes to the funding formula. The LA has consulted with schools on the proposal to move 0.5% from the Schools Block to the High Needs Block, the results of the consultation are included in Item 12 on the agenda

Need for decision

Recommendations

- Note the mandatory changes to the 2024/25 funding formula. Consider and give a view of the proposals for the 2024/25 Schools Funding Formula including the disapplication requests and the increase to the PFI factor funding.

Contact Officers

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Appendix A

School Name	Pupil Numbers 24/25	2024/25 Actual (adjusted for TPG and TPEG)	indicative 2025/26 with estimated NFF values	Difference between 24/25 & 25/26	2025/26 with 0.5% transfer	Estimated Difference between 24/25 & 25/26	Difference between estimated NFF values and 0.5% trf
Abbey Park Academy	187	1,090,627	1,139,101	48,474	1,133,667	43,040	-5,434
All Saints' CofE Primary School	211	990,917	1,018,670	27,754	1,012,539	21,622	-6,132
Ash Green Community Primary School	411	2,575,658	2,683,858	108,200	2,671,914	96,256	-11,944
Bailiffe Bridge Junior and Infant School	192	940,496	980,933	40,436	975,353	34,857	-5,580
Barkisland CofE VA Primary School	191	897,049	922,834	25,786	917,284	20,235	-5,550
Beech Hill School	461	2,645,173	2,657,606	12,433	2,657,606	12,433	0
Bolton Brow Primary Academy	211	1,030,084	1,076,167	46,083	1,070,036	39,951	-6,132
Bowling Green Academy	151	785,189	820,480	35,292	816,092	30,904	-4,388
Bradshaw Primary School	326	1,536,167	1,603,701	67,534	1,594,228	58,061	-9,474
Brighouse High School	1,042	6,734,261	7,042,962	308,701	7,000,578	266,317	-42,384
Burnley Road Academy	171	915,873	956,739	40,866	951,770	35,897	-4,969
Carr Green Primary School	308	1,507,336	1,567,346	60,010	1,558,395	51,059	-8,950
Castle Hill Primary School	168	885,406	923,916	38,509	919,034	33,627	-4,882
Central Street Infant and Nursery School	72	463,291	483,113	19,822	481,021	17,730	-2,092
Christ Church CofE VA Junior School, Sowerby Bridge	93	574,127	596,029	21,902	593,327	19,199	-2,703
Christ Church Pellon CofE VC Primary School	167	1,072,801	1,119,987	47,186	1,115,134	42,333	-4,853
Cliffe Hill Community Primary School	161	967,894	1,010,127	42,233	1,005,448	37,554	-4,679
Colden Junior and Infant School	74	489,255	509,458	20,204	507,308	18,053	-2,150
Copley Primary School	302	1,450,182	1,480,103	29,921	1,471,327	21,145	-8,776
Cornholme Junior, Infant and Nursery School	143	865,347	903,071	37,724	898,916	33,568	-4,156
Cross Lane Primary and Nursery School	300	1,616,563	1,687,775	71,212	1,679,057	62,494	-8,718
Dean Field Community Primary School	201	1,190,731	1,242,727	51,996	1,236,886	46,155	-5,841
Elland Church of England (Voluntary Aided) J, I and N School	142	957,619	999,917	42,298	995,791	38,171	-4,127
Ferney Lee Primary School	186	1,099,887	1,146,221	46,333	1,140,815	40,928	-5,405

Field Lane Primary School	86	598,349	619,292	20,943	616,793	18,444	-2,499
Hebden Royd CofE VA Primary School	96	534,073	557,943	23,870	555,153	21,080	-2,790
Heptonstall Junior Infant and Nursery School	50	354,815	369,725	14,910	368,272	13,457	-1,453
Holy Trinity Primary School, A Church of England Academy	372	1,934,252	2,017,421	83,169	2,006,611	72,358	-10,810
Holywell Green Primary School	157	849,261	886,555	37,294	881,993	32,732	-4,562
Lee Mount Primary School	288	1,668,208	1,742,443	74,235	1,734,074	65,865	-8,369
Lightcliffe Academy	932	6,491,647	6,785,412	293,765	6,747,434	255,787	-37,978
Lightcliffe C of E Primary School	412	1,932,552	1,943,675	11,123	1,943,675	11,123	0
Ling Bob Junior, Infant and Nursery School	294	1,725,480	1,774,069	48,589	1,765,525	40,045	-8,544
Longroyde Primary School	357	1,819,263	1,897,247	77,984	1,886,873	67,609	-10,374
Luddenden CofE School	93	617,228	644,845	27,616	642,142	24,914	-2,703
Luddendenfoot Academy	193	918,204	959,650	41,447	954,042	35,838	-5,609
Midgley School	71	438,255	454,344	16,089	452,281	14,026	-2,063
Moorside Community Primary School	210	1,302,450	1,358,765	56,315	1,352,663	50,213	-6,103
Mount Pellon Primary Academy	269	1,557,769	1,625,673	67,903	1,617,856	60,086	-7,817
New Road Primary School	174	975,026	1,019,094	44,068	1,014,038	39,012	-5,056
Norland CE School	75	462,329	482,568	20,239	480,389	18,059	-2,180
Northowram Primary School	416	1,983,177	1,993,408	10,231	1,993,408	10,231	0
Old Earth Primary School	420	1,982,135	2,068,629	86,494	2,056,424	74,289	-12,205
Old Town Primary School	78	453,795	474,061	20,266	471,794	17,999	-2,267
Park Lane Academy	425	3,550,533	3,707,773	157,240	3,690,521	139,987	-17,253
Parkinson Lane Community Primary School	499	2,798,811	2,887,835	89,025	2,873,334	74,524	-14,501
Rastrick High School	1,787	11,449,131	11,973,749	524,618	11,901,035	451,904	-72,714
Ripponden Junior and Infant School	182	917,234	954,314	37,080	949,025	31,791	-5,289
Riverside Junior School	126	669,964	699,833	29,869	696,172	26,208	-3,662
Ryburn Valley High School	1,391	9,225,147	9,635,311	410,164	9,578,718	353,572	-56,592
Sacred Heart Catholic Voluntary Academy	180	992,420	1,037,208	44,788	1,031,977	39,557	-5,231
Salterhebble Junior and Infant School	204	1,040,250	1,085,359	45,109	1,079,431	39,181	-5,928
Salterlee Primary School	93	504,321	526,877	22,556	524,174	19,854	-2,703
Savile Park Primary School	370	2,425,023	2,469,297	44,275	2,458,545	33,522	-10,752
Scout Road Academy	99	536,366	559,910	23,544	557,033	20,667	-2,877
Shade Primary School	158	838,316	875,132	36,816	870,541	32,225	-4,591
Shelf Junior and Infant School	239	1,147,617	1,197,536	49,919	1,190,590	42,974	-6,945

Siddal Primary School	170	994,485	1,038,699	44,215	1,033,759	39,275	-4,940
St Andrew's Church of England (VA) Infant School	162	863,391	899,392	36,001	894,684	31,293	-4,708
St Andrew's CofE (VA) Junior School	221	1,146,674	1,198,573	51,899	1,192,150	45,476	-6,423
St Augustine's CofE School	159	1,079,428	1,125,326	45,899	1,120,706	41,278	-4,621
St John's (CofE) Primary Academy, Clifton	204	977,257	1,019,431	42,175	1,013,503	36,246	-5,928
St John's Primary School In Rishworth	145	708,186	739,575	31,389	735,361	27,175	-4,214
St Joseph's Catholic Primary Academy	150	830,646	866,348	35,701	861,989	31,342	-4,359
St Joseph's Catholic Primary Academy	194	977,155	1,020,344	43,189	1,014,707	37,552	-5,638
St Joseph's Roman Catholic Voluntary Academy	109	689,930	721,555	31,625	718,387	28,457	-3,168
St Malachy's Catholic Primary School, A Voluntary Academy	150	975,692	1,011,304	35,611	1,006,945	31,252	-4,359
St Mary's Catholic Primary Academy	303	1,613,797	1,682,001	68,204	1,673,196	59,399	-8,805
St Mary's CofE (VC) J and I School	87	493,993	515,555	21,562	513,027	19,034	-2,528
St Michael and All Angels CofE Primary & Pre School	181	911,713	951,901	40,188	946,641	34,928	-5,260
St Patrick's Catholic Primary Academy	95	573,691	598,478	24,787	595,717	22,026	-2,761
Stubbings Infant School	41	305,784	319,090	13,306	317,898	12,115	-1,191
The Brooksbank School	1,400	9,232,394	9,654,262	421,868	9,597,326	364,932	-56,936
The Calder Learning Trust	1,345	8,567,117	8,954,492	387,375	8,900,713	333,596	-53,779
The Crossley Heath School	900	5,509,333	5,584,574	75,242	5,547,946	38,614	-36,628
The Greetland Academy	398	1,948,897	1,958,794	9,897	1,958,794	9,897	0
The Halifax Academy	1,437	10,091,763	10,221,679	129,916	10,167,827	76,064	-53,852
The North Halifax Grammar School	902	5,522,440	5,548,783	26,343	5,548,783	26,343	0
Todmorden CofE J, I & N School	200	1,067,896	1,115,575	47,679	1,109,763	41,867	-5,812
Todmorden High School	875	5,977,734	6,246,994	269,259	6,211,407	233,672	-35,587
Triangle CofE VC Primary School	186	936,526	976,772	40,246	971,367	34,841	-5,405
Trinity Academy Akroydon	257	1,416,106	1,479,013	62,906	1,471,544	55,438	-7,468
Trinity Academy Grammar	999	7,686,370	8,027,200	340,831	7,986,633	300,263	-40,567
Trinity Academy Halifax	1,616	11,390,234	11,907,499	517,265	11,841,773	451,540	-65,726
Trinity Academy St Chad's	141	716,845	748,723	31,878	744,625	27,780	-4,097
Trinity Academy St Peter's	104	670,854	700,856	30,001	697,833	26,979	-3,022
Tuel Lane Infant School	57	417,620	435,477	17,857	433,820	16,201	-1,656
Wainstalls School	199	955,214	997,239	42,025	991,456	36,242	-5,783
Walsden St Peter's CE (VC) Primary School	174	878,307	913,724	35,417	908,668	30,361	-5,056
Warley Road Primary Academy	441	2,386,110	2,475,231	89,121	2,462,415	76,306	-12,815

Warley Town School	134	715,070	745,940	30,869	742,046	26,975	-3,894
West Vale Academy	101	628,498	656,704	28,206	653,769	25,271	-2,935
Whitehill Community Academy	617	3,078,021	3,215,305	137,284	3,197,375	119,354	-17,930
Withinfields Primary School	301	1,526,700	1,593,142	66,442	1,584,395	57,695	-8,747
Woodhouse Primary School	418	1,987,990	1,999,323	11,333	1,999,323	11,333	0
Total	32,240	194,425,200	201,722,672	7,297,472	200,714,334	6,289,134	1,008,338

Report to Schools Forum

Item	10
Meeting Date	14 November 2024
Subject	Growth Fund
Report Author	Jane Davy

Report purpose

To provide members of Schools Forum with a report on how the Growth Fund has been allocated to schools in 2023-24, the expected expenditure for 2024-25 and to agree the amount of DSG (schools block) to be retained for this purpose in 2025-26.

Need for consideration

N/A

Need for decision

N/A

Contact Officers

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1. Background information and context

- a) From 2024 to 2025 it is mandatory for local authorities to provide growth funding where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area (either as a bulge class or as an ongoing commitment).
- b) Calderdale have operated a growth fund for several years and are currently following the operational guidance on growth funding. For clarity the minimum a Local Authority has to fund is £1,550 x number of pupils x ACA for primaries and £2,320 x number of pupils x ACA for secondary schools, Calderdale fund at the current AWP value which is significantly higher than the minimum required. Therefore, it is proposed to not make any changes to Calderdale's growth fund.
- c) A school with an additional form of entry from September would ordinarily only receive formula funding from the following April. Expanding schools will not only incur the costs of educating those children in that period but will also have setting up costs (preparing classrooms, providing materials and resources) and have some lead in costs (recruitment and salary costs). The Growth Fund allows local authorities to provide funding to meet those costs for each new intake (7 years for a primary and 5 years for a secondary school).
- d) In June 2021, after consultation with schools a revised criteria was agreed for Growth and was implemented from April 2022, see Appendix 2,
- e) For 2023-24 and 2024-25 Schools Forum agreed the Growth Fund allocated from the schools block DSG would be zero and £100k respectively. Any under/overspends would be carried forward to 2024-25.

2. Main issues for Schools Forum

Need for consideration

- a) For the academic year 2023-24 the Local Authority agreed an expansion of pupil numbers and a Growth Fund allocation for the following schools: Copley Primary (half a form), Brooksbank (half a form) and Ryburn Valley High (45 pupils)
- b) The final allocations made from the Growth Fund for the 2023-24 financial years totalled £466,840 leaving a surplus of £36,013 (after receipt of £276k from the ESFA for the academies). Original forecast reported to School Forum in October 2023 was for a surplus of £23k a difference of £13k is due to a reduction of numbers required at Brooksbank and Ryburn Valley High.
- c) The allocations made from the Growth Fund for 2023/24, and the estimated continued allocations for future years for these schools are shown in Appendix 3. From Sept 2024 the Adults and Children's Schools Reorganisation Team has advised that the following schools/academies

will continue to receive funding for 24/25; Copley, Brooksbank and Ryburn Valley High.

- d) Based on the above projected commitments there will be a surplus within the Growth Fund for 2024/25 estimated at £2.6k which, School Forum are asked to approve to carry forward to 2025/26. The LA will recommend that this amount is used to fund the 0.5% transfer to High needs requested in agenda item 12
- e) A Table showing the above allocations can be found at Appendix 3.
- f) Growth funding is allocated to local authorities using a formulaic method based on lagged growth data. Due to the change in Government the ESFA has not yet issued the indicative funding for 25/26. Therefore, officers can not estimate how much growth funding Calderdale will receive for 25/26. However, officers from the Adults and Childrens Services Reorganisation Team have advised that no school or academy will need growth funding for 25/26. It is proposed that any growth funding received within the schools block allocation is retained towards the 0.5% transfer to the High Needs Block please see agenda Item 12. When final allocations are known in December, a report will be brought to the January Schools Forum detailing the exact amounts received

3. Recommendations

- a) Schools Forum notes the Growth Fund allocations for 2023-24.
- b) Schools Forum notes the estimated expenditure for 2024-25.
- c) School Forum members agree to carry forward the surplus balance of £2.6k to 25/26. A vote on the use of this balance will be voted on in Agenda Item 12
- d) Schools Forum notes that the LA are recommending to use any growth fund allocation to fund the 0.5% transfer to High Needs which will require members to vote on Agenda Item 12.

4. Reasons for recommendations

- a) The LA should report the expenditure and balance of Growth Fund in accordance with the School Finance Regulations to schools forum.
- b) As Growth Fund is within the schools block, a movement of funding from the schools formula into the growth fund would not be treated as a transfer between blocks. Schools Forum has to agree the amount of funding set aside for the Growth Fund.

5. Impact of funding, targets, and milestones

Growth Fund supports growth in pre-16 pupil numbers to meet basic need, a maintained school with an additional form of entry from September would ordinarily only receive formula funding from the following April, academies would only receive formula funding from the following September. Expanding schools will not only incur the costs of educating those children in that period but will also have setting up costs

(preparing classrooms, providing materials and resources) and have some lead in costs (recruitment and salary costs).

6. Resource implications

Funding should be met from the 24/25 schools block growth allocation. The exact amount will not be known until mid December 2025 and will be reported to Schools Forum at the January meeting. Funding for growth cannot be met from any other sources of funding. Therefore, if funding is not retained from the schools block, growing schools will not receive enough funding to support the additional pupils in that school until the following April or Sept for maintained schools and academies respectively.

7. Appendices

Appendix 1

Original criteria – December 2013

- a. In order to qualify for Growth Funding, schools are required to formally request and obtain written approval to expand from the Director of Children & Young People's Services prior to school expansion.
- b. Expansions of at least half a class (15 pupils) will be funded from the Growth Fund.
- c. Permanently expanding schools will qualify for funding from the Growth Fund for each year of the expansion phase programme. For primary schools this will typically be 7 years and correspondingly would be 5 years for secondary schools.
- d. Funding will be provided at the appropriate Basic Entitlement rate for the expanding class based upon the actual number of additional pupils in Reception or Year 7. Below is an example for a new primary class of 30 opening in September 2014 (i.e. where October 2013 census numbers were 30 less);
Primary Basic Entitlement unit value = £2,837
September 2014 to March 2015 = 7/12ths of financial year
 $£2,837 \times 30 \times 7/12\text{ths} = £49,648$
- e. This funding is intended to support the additional direct revenue costs associated with the expansion; teaching and support staffing costs, resourcing equipment for classrooms and senior management costs associated with implementing the permanent expansion, before the increase in pupils is reflected in the main funding formula.
- f. For maintained schools, from the following April (i.e. April 2015 in this example), the additional pupils would be funded in the normal funding formula based on October 2014 pupil data.
- g. In the case of academies, their funding is on an academic year basis and therefore the Local Authority would be responsible for providing funding for a

further 5/12ths in the following financial year (i.e. April to August). The DfE will then adjust Calderdale's DSG allocation to recognise that the Local Authority has provided additional funding in the following financial year ('recoupment').

- h. The Growth Fund can only be used for the purposes of supporting growth in pre-16 pupil numbers to meet basic need. Funds must be used on the same basis for the benefit of both maintained schools and academies.
- i. The criteria and the total sum to be top-sliced from DSG need the agreement of Schools Forum and the Education Funding Agency (EFA) who check criteria for compliance.
- j. Any funds remaining in the Growth Fund at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and academies through the local formula. Conversely any overspend would need to be met from the following years DSG allocation.

Criteria added in April 2014

- k. Additional basic need provision on a different site will also attract;
 - Split site funding at the current rate applicable e.g. 7/12ths £12,833, full year £22,000.
 - A lump sum to reflect reasonable start-up costs up to a maximum of £35,000 for one form of entry and a maximum of £50,000 for two forms of entry.
- l. Pupil increases qualifying for growth funding should be funded in multiples of 30 for the first year (to provide a certain level of protection should actual intake be less than a full form of entry) and multiples of 15 for subsequent year's intakes.
- m. To recognise additional pupil needs – supplement the basic entitlement funding for additional pupil needs (deprivation, prior attainment, looked after children, English as an additional language) by using the proportion of eligible children already at the school at 7/12ths of the current rates for these factors.
- n. Provide additional rates costs – provide a sum equivalent to any additional business rates incurred by the school.

Appendix 2

Calderdale Growth Fund Criteria

1. The growth fund will only be used to:
 - support growth in pre-16 pupil numbers to meet basic need.
 - support additional classes needed to meet the infant class size regulation.
 - Meet the costs of new schools where the new school is the result of a LA led proposal required to meet basic need.
 - Growth (permanent and bulge) must be approved by the Local Authority in advance.

2. The growth fund will not be used to support:
 - schools in financial difficulty; any such support for maintained schools should be provided from a de-delegated contingency.
 - general growth due to popularity, this will be provided for in the school's annual allocation.

3. Growth funding
 - Growth in September 2024 will be funded from September 2024 to March 2025 (7/12ths) in maintained schools and from September 2024 to August 2025 in academies.
 - The ESFA will refund 5/12ths of the growth funded to academies in the following financial year.
 - Expansions of half a class (up to 15) and upwards will be funded from the growth fund.
 - Permanently expanding schools will receive growth funding for 7 years in primary and 5 years in secondary, to make up the shortfall in funding for reception and Y7.
 - The AWPU (based on April 2024 values) was £3,549.92 for primary and £5,005 for secondary. The AWPU will be revised annually.
 - **Full form of entry up to 30 pupils**
 Each new form of entry will receive a first-year funding guarantee of a minimum of $7/12 \times 25 \times \text{AWPU}$, for the period September to March for maintained schools, and September to August for academies.
 If more than 25 pupils appear on the October census for reception or year 7 additional AWPU will be allocated (up to a maximum of 30).
 There will be no claw-back if less than 25 pupils appear.
 - **Half form of entry up to 15 pupils** Each
 new half form of entry will receive a first-year funding guarantee of a minimum of $7/12 \times 12.5 \times \text{AWPU}$, for the period September to March for maintained schools, and September to August for academies.
 If more than 12.5 pupils appear on the October census for reception or year 7, additional AWPU will be allocated (up to maximum of 15).
 There will be no claw-back if less than 12.5 pupils appear.
 - If the numbers into reception and Y7 do not materialise in subsequent years, the funding may cease.
 - For bulge years there will be a first-year funding guarantee as detailed above.
 - Once the LA has received the APT data from the ESFA (usually mid-December), maintained eligible schools will receive growth fund (7/12ths) as a lump sum in the January SOF payment, academies will receive two payments 7/12th in January SOF payment and 5/12th in the summer term (usually June).

4. Exceptional Circumstances

- In exceptional situations there may be a tailored approach specific to the needs of the school; for example, a school facing growth across a number of year groups arising from housing developments, where the approaches above would not be appropriate. In these exceptional circumstances it may be appropriate for a growing school to be funded via estimated pupil numbers through the APT
- new and growing schools: it may be appropriate for a new and growing school to be funded via estimated pupil numbers through the APT
- In exceptional situations, additional funding may be provided towards start-up costs outside of the agreed growth fund formula.
- in exceptional circumstances, where a school needs to admit a pupil into a key stage 1 class for a reason other than as an 'excepted pupil' under the school admissions code, additional funding will be made available, if necessary, to enable the school to take relevant measures to comply with the infant class size regulations. The funding will be a minimum of $7/12 \times 12.5 \times \text{AWPU}$, for the period September to March for maintained schools, and September to August for academies.
- In exceptional circumstances where provision is on a different (not previously existing site) spilt site funding will be considered.

5. Allocation of Growth Fund and Under and Overspends of the fund.

- Schools Forum will approve the Growth Fund on an annual basis based upon the growth (permanent and bulge) approved by the Local Authority and justified by the pupil planning places information.
- Any under or overspend on growth funding will be carried forward to the following funding period or if appropriate returned to be allocated to schools via the funding formula.

Appendix 3

Growth Fund Summary

School	Actual 2021/22	Actual 2022/23	Actual 2023/24	Estimate 2024/25	Estimate 2025/26
Copley	30,492	29,702	29,663	31,062	
Calder Learning Trust	91,327	66,238			
<i>Rastrick Academy</i>	274,750	251,110	85,163		
<i>Trinity Grammar</i>	162,927	195,862	56,775		
<i>Trinity Academy Halifax</i>	168,827	152,369	56,775		
<i>Brooksbank</i>	76,351	33,428	33,448	67,685	31,281
<i>Ryburn</i>	257,387	217,411	205,017	216,992	93,844
Total Annual Cost	1,062,061	946,119	466,840	315,738	125,125
Budget	500,000	580,586	0	172,886	0
refund from EFA re Academy					
Schools	306,387	452,754	276,306	109,502	125,125
overspend/underspend	-255,674	87,221	190,534	33,351	0
Projected Cumulative overspend	139,326	226,547	36,013	2,662	2,662

N.B.

All estimated calculations based 2024-25 funding

Formula

Pupils numbers provided by Capital and Access Team and
will be subject to change

Report to Schools Forum

Item	11
Meeting Date	14 November 2024
Subject	Falling Rolls Fund
Report Author	Jane Davy

Report purpose

To provide members of Schools Forum with report on the amount of Falling Rolls fund expended in 23/24 and to agree the amount to be retained from the growth fund/falling rolls fund element of the schools block DSG for 2025-2026.

Need for consideration

N/A

Need for decision

For School Forum to agree the amount to be retained for the Falling Rolls Fund.

Contact Officers

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1. Background information and context

In Summer 2022, the Government consulted on its intention to fund falling rolls from 24/25 onwards. The operational school funding guidance sets out how this should be administered at Local Authority level. Although local authorities will continue to have discretion over some of the criteria and whether to operate a falling rolls fund, they can only provide funding where school capacity data 2023 (SCAP) shows that school places will be required in the subsequent three to five years. In addition the requirement that schools must be Ofsted rated “good” or “outstanding” to be eligible for falling rolls funding will no longer apply. Calderdale have operated a falling rolls fund from April 2022 and will apply the mandatory changes to the eligibility criteria see Appendix 1 for revised criteria.

2. Main issues for Schools Forum

Need for consideration

- a) For the 24/25 eligibility, LA officers have used the data from the Oct 23 census to assess the eligibility and calculate the amount required. No Schools were allocated falling rolls funding. At the Schools Forum meeting in January 24 it was agreed carry forward £72,886 to the 2024/25 Growth fund budget and the funding received for falling rolls (£140k) was transferred to High Needs following the Secretary of States ruling that 0.5% of Schools block could be transferred to High Needs.
- b) Data has been provided by the LA’s Schools Organisation and Planning section in August 24 this has been used to apply to the LA’s criteria to estimate which schools will be eligible.
- c) Due to a change in Government indicative allocations have not yet been announced. However after applying the data it is estimated that no Calderdale school or academy will be eligible for falling rolls fund for 25/26.
- d) Forum members are asked to note that if there is any falling rolls fund allocated in 25/26 schools block, the LA propose to use this to fund the request for 0.5% transfer to the High Needs Block (see agenda item 12)

3. Recommendations

- a) Schools Forum notes there was no expenditure for falling rolls in 24/25
- b) Schools Forum notes that no funding is required for 2025/26
- c) Schools Forum members note that the LA recommend to use any funding received for falling rolls be used towards the 0.5% transfer to the High Needs Block and will be voted on at Agenda item 12.

4. Reasons for recommendations

- a) The LA should report the expenditure and balance of Falling Rolls Fund in accordance with the School Finance Regulations to schools forum.

- b) As falling rolls is funded within the schools block, a movement of funding from the schools formula into the falling rolls fund would not be treated as a transfer between blocks. The schools forum still needs to agree the total falling rolls fund

5. Impact of funding, targets, and milestones

Falling Rolls Fund supports all schools and academies with falling pre-16 pupils numbers to maintain a good or outstanding quality of education until pupil numbers recover.

6. Resource implications

Funding should be met from the 2025/26 schools block allocation.

7. Appendices

Appendix A

Falling Rolls Fund

Falling Rolls is funded from the schools block allocation for Growth Funding. The Falling Rolls Fund Criteria and the amount allocated is agreed by the Schools Forum.

Falling rolls fund criteria and method of allocation.

- a) Only schools with fewer than 420 pupils will be considered for the falling rolls fund.
- b) Schools receiving growth funding are excluded.
- c) Between the October census two years prior to the latest census the total NOR (for the whole school) has dropped by at least 10% and the number of pupils admitted to reception or year 7 by at least 20% of the PAN.
- d) The drop in NOR is not a result of a bulge class leaving the school.
- e) Balances held by the school, Academy or MAT at the last year-end must be less than £60k excluding ring fenced grants (Example PE and Sports Grant Premium, Cluster Income).
- f) Local planning data shows the places (at the school) will be required within the next 3 years.
Funding will normally be available for a maximum of 3 years, provided that pupil numbers do not recover in the meantime.
- g) If schools/academies meet the above criteria they will be allocated funding based on the basic entitlement (AWPU) for the vacant places below 85% of PAN for the whole school.
The minimum funding guarantee (MFG) and sparsity funding will be deducted from the additional funding.

Report to Schools Forum

Item	12
Meeting Date	14 November 2024
Subject	Proposed Schools Block Transfer 2025-26
Report Author	Emma Ingham-Send & Inclusion Service Manager Victoria Coyle-Interim Head of Send Jane Davy – Finance Manager LMS Team

Report purpose

The purpose of this report is to set out the proposal to transfer 0.5% of the Schools Block of the Dedicated Schools Grant to the High Needs Block in 2025 -2026

Need for consideration

To note the indicative allocations of the Dedicated Schools Grant as detailed in this report.

Need for decision

To approve a transfer of 0.5% from the Schools Block to the High Needs Block.

Contact Officers

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1. Background information and context

- a) Prior to 2018/19 local authorities had full flexibility to transfer funding between blocks, this had largely been from Schools to High Needs. However, the 2018/19 school funding reforms saw the introduction of the National Funding Formula (NFF) for schools and High Needs. The Department for Education (DfE) limited the ability to transfer funding from the Schools Block to High Needs.
- b) Since 2018/19 local authorities have been able to transfer up to 0.5% of the Schools Block to High Needs following the approval of the Schools Forum. Should the Schools Forum not approve a transfer, approval can be sought from the Secretary of State. Furthermore, a transfer of greater than 0.5% of the Schools Block can only be made with the approval of the Secretary of State.
- c) There are no restrictions on transfers between other blocks. Approval for a transfer is only for the year it is enacted; further approvals are required annually.
- d) Calderdale prior to 2022/23 managed the high needs pressures within the budget. However, since then the high needs block has been in deficit, £868k in 22/23, £5.067million in 2023-24 and a projected deficit of £13.817M for 24/25 reasons for this are detailed below.

2. Main issues for Schools Forum

- a) The Schools Block is ring-fenced in 2025 to 2026, however local authorities can transfer up to and including 0.5% of their Schools Block funding into another block, with the approval of their Schools Forum.
- b) The indicative funding has not yet been announced for 25-26 due to the change in Government in July, the ESFA have indicated that this will be announced at the end of November. Therefore, for the purpose of this report officers have estimated a 2% increase from 24/25 NFF plus rolling in the TPAG and TPEG. The ESFA have stated that the Schools Core Budget Grant will be rolled into the NFF from April 25 but at the time of writing the report, officers were not aware of the full year grant amount. Therefore, I have not included the funding figures in this report.
- c) Based on the estimated funding data, 0.5% equates to £1.01m. Initial modelling can be found in Appendix 1.
- d) Modelling shows that this can be funded by just reducing Basic Entitlement. However, until the operational guidance is issued indicating what the minimum amount can be allocated for each factor we may have to reduce other factors. The LA propose to reduce the following factors in the order listed to fund the block transfer.
 - 1. Lower Prior Attainment
 - 2. Free School Meals
 - 3. Free School Meals Ever 6
 - 4. Basic Entitlement

The reasoning behind this is because the above factors are used in the notional SEN calculation Lower Prior Attainment being the highest % factor used followed by FSM, FSM6 and finally Basic Entitlement.

Growth and Falling Rolls

- e) Calderdale may receive funding for growth and falling rolls, the amount is not known at this time, The LA would not need any of this funding to meet its statutory duties (as discussed in agenda items 10 & 11). If Calderdale receive any funding the LA propose to be use this towards the 0.5% transfer to the High Needs and this will reduce the amount taken from the factors listed above.

Managing High Needs expenditure

- a) To manage High Needs expenditure, the Local Authority has and will continue to support new initiatives, including increasing places at special schools and the development of new SEND Hubs and resource bases. Additionally, the LA will seek to:
 - Address the increasing overspend across the High Need Block
 - Manage demand for provision through multi-agency early intervention and co-production.
 - Support children and young people to access local provision.
 - Ensure sufficient supply of SEND provision through expansion of resource bases and increased special school places.
 - Continue to improve the internal processes and systems supporting the statutory assessment process, which determine the majority of High Needs Block spend.
 - continue to closely monitor contracts for independent provisions to ensure they are cost effective, adequately meet needs and continue to offer good value.
 - Review our direct payments and personal budgets to ensure that they meet the needs of Children and young people and there is sufficient information and support for schools, practitioners and parents.
- b) The LA are taking proactive steps to enhance the educational infrastructure within the local area by initiating comprehensive capacity and feasibility studies on schools and surrounding areas. This will allow the optimal utilisation of existing school facilities, the assessment of potential expansion requirements, and evaluations on the impact on surrounding neighbourhoods. These informed decisions will not only address the current educational demands but also ensure suitable sustainable growth and development.
- c) In 2024/25 0.5% of the Schools Block was transferred to High Needs. This equated to £962,674. To ensure this block transfer was used to create change and not offset the deficit, a system change approach was taken to using the monies. 100% of the Schools Block transfer was passported back to schools to support the development of an Additional Resourced Provision (ARP) programme for those settings who developed their internal provisions to support a more specialist offer for cohorts of SEND children and young people. This equated to £216,344 for ARPs and £577,891 for exceptional

funding requests to date; the remainder of £178,439 will be spent on further requests by March 25.

- d) The LA have been selected to take part in the SEND and AP Change Programme arranged by the DFE. This will be a key event to present a voice for change within the SEND and AP system, providing better outcomes for children and their families.
- e) Calderdale are required to publish a DSG recovery plan which will be shared with Schools Forum members and will provide regular feedback and the opportunity for the HNBRG (to include school representatives) to shape and monitor the plan.
- f) No single action alone will be sufficient to mitigate the existing deficit, this will only be addressed through a combination of interventions. A longer-term financial management plan to recover the deficit, using the ESFA recommended deficit management plan template, has been developed that is consistent with the actions and objectives outlined above.

3. Recommendations

1. School Forum members are asked to consider the result of the consultation and vote on the proposal to move 0.5% of Schools Block to the High Needs Block
2. If members vote Yes, do they agree with the methodology of the calculation of the transfer of funding.
3. If members vote NO, to note that LA officers will seek a decision from Council Leaders on applying to the Secretary of State for a disapplication of School Forum Vote. LA Officers will report back to Forum members of the Council decision, by email, as soon as it is known.

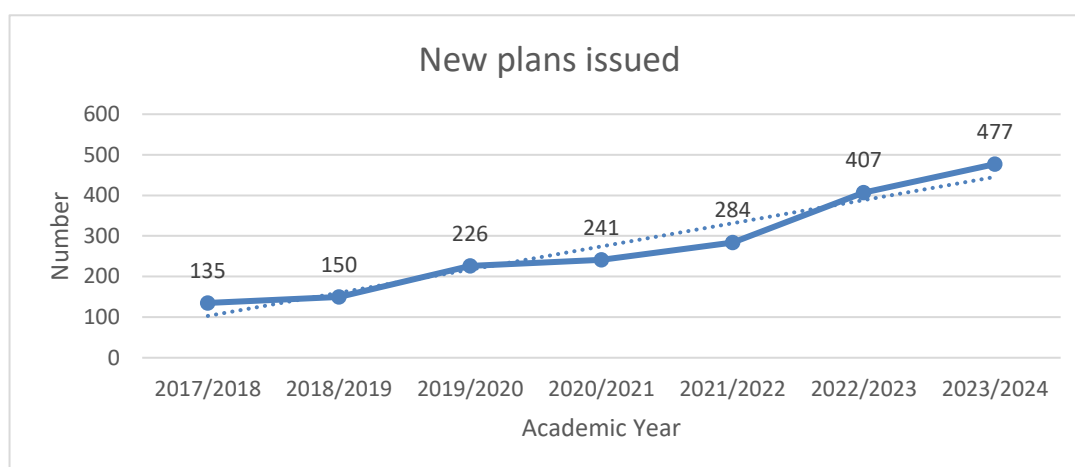
4. Reasons for recommendations

High Needs – Rationale for request

- a) Calderdale has experienced a sharp increase in costs under High Needs which are driving increasing deficit. Since 2022/23 the high needs block has been increasingly in deficit, with £868k deficit in 22/23, £5.067million in 2023-24 and a projected deficit of £13.817M for 24/25. The increase in spend is caused by rising demand, need and expectations alongside continued and sustained pressure on resources.

The demand for support from High Needs continues to grow as evidenced by the growth in request for EHCP assessments (214 in 2018/9 increasing to 618

in 2023/24, and increases in new EHCPs issued (Figure 1). Given the continued rise in requests, it is likely that the trend for increased numbers of children with a plan is likely to continue next year.



- b)** Another key driver for cost is the package of support needed for each child and young person. At time of writing, the average top up for a child in mainstream is approx. £9.8k, and £16.5k top up for children in state funded special schools.
- c)** Increase in early years inclusion funding from High Needs Block- This has been steadily increasing over the last three years.
 - 21/22 £464k
 - 22/23 £635k
 - 23/24 £1 million
- d)** There has been a continued increase in demand for support for children within the early years who have been identified as having special educational needs. The Inclusion Fund is for those children who already have identified needs and have agencies working together to support them. The funding is be based on the needs of the child and supports practitioners to improve the child's early learning and development outcomes. The funding is to implement low level, early support to improve outcomes for the child and reduce longer term costs. Providers use the Inclusion funding for:
 - Extra staff time to support specific interventions.
 - Specialist or one-off extra training, or to upskill a team or staff member.
 - Specialist support, such as speech and language therapy, which may benefit more than one child.
 - Support for coordinating key worker duties, such as the team around the child.
 - Help for children who are transitioning to school, releasing key workers to support the process by spending time at the school.

- e) Whilst there are more children with an EHCP in mainstream in Calderdale (48% of SEND learners with EHCPs in mainstream provision compared to 37.7% national), due to increasing numbers of children being identified and assessed as needing specialist provision, there has been an increase in special school places- special school places have been steadily increasing over the last 5 years.
- f) Due to pressures on places in state funded special schools locally, the number of children attending independent special school places has increased. As of September 2024, the HN block supports 190 learners at an average cost of £66,076.00 independent non-maintained special schools range between £35,000.00 and £128,000.00 per annum. In addition, the average price increase in this sector is 8.4% year on year. The projected expenditure for 2024-25 on these placements is £13.95M and equates to 40.2% of Calderdale's high needs DSG allocation. This rise in expenditure has doubled each year between 2021 and 2024 which means future projections are unsustainable if unmitigated.
- g) The use of independent settings is driven by a lack of appropriate provision in the local area, parental preference and mainstream settings stating they are unable to meet need following consultation or annual review. Placements are likely to continue to increase whilst LA officers and school leaders work to develop more provision, particularly for children with SEMH needs.

Exclusions

- a) The DfE requires the Council to identify where costs may be being passed from the Schools to High Needs, and the DfE specifically references exclusions. There has been a marked increase in the number of pupils excluded increasing from 34 in 2019/20 to 101 children being permanently excluded in 2023/24, leading to the need to find and fund alternative provision. This results in additional pressure placed on the High Needs Budget
- b) To place a pupil in the pupil referral unit costs the LA £10k per annum plus £15k per pupil up to a maximum of 80 pupils, any additional pupils above the 80 cost £25k per annum, this increases significantly if pupils are placed in alternative provision or specialist provision outside the borough. Whilst the LA does recoup some funding from schools and academies in accordance with the school finance regulations, the current maximum recoup is £6,692 per annum for a key stage 4 pupil falling to £5,030 per annum for a Key Stage 1 pupil
- c) In accordance with the school funding operational guidance the LA consulted with stakeholders on the above. The consultation ran from Thursday 3rd October to Wednesday 30th October 2024 This was sent to all mainstream school headteachers/principals and chair of governors. LA officers discussed

the consultation at CASH and CPHA, a reminder was sent on Thursday 24th October and the consultation was also available on the schools' intranet.

The consultation asked the following questions:

- Do you support a transfer of funding of funding from the School Block to the High Needs Block for 2025-26?
- Do you support the full transfer of 0.5% or £1.0M based upon indicative funding data?
- If you do support the transfer, do you agree with funding the 0.5% firstly from any surplus funding after following the NFF, secondly and surplus funding from Growth or Falling Rolls Fund and finally from the individual school budget share as set out above?

There was an opportunity for stakeholders to comment on the proposals.

d) The consultation received 37 responses, a summary of the responses is below.

Question	Yes	No	Don't know
Q1	17	17	3
Q2	15	18	4
Q3	13	13	10

The results are split, whilst the full response can be given to members if requested, some notable comments follow:

For the transfer:

"... like every other school our budget is precious and losing 0.5% is not ideal! If there were other ways to service the HNB deficit without schools' contribution then great! However, we can see much greater clarity than 12 months ago with how the vision moving forward can support our children and all those in Calderdale and we feel morally and ethically that we should contribute to this. We, as a governors' Resource Committee agree that we will support this".

"Happy to support as I can see this actively coming back into schools in different ways".

"My response of 'yes' is due to the LAs commitment to work with academy partners to address the underlying issues related to the need to fund the HNB to a higher level".

Against the transfer:

"Schools have higher need children many of whom applied to specialist provision and where declined due to spaces. We have increased number of children with SEMH needs in every year group. We are struggling to keep the SENDTAs we have, funding for EHCPs doing not reflect on costs. We will be

forced to Suspend and exclude more pupils and this just becomes a downward spiral of need.

Fund more specialist hubs in Calderdale and not pay for private out of area places”.

“As much as I can see the need for further funding for the High Needs block is critical, taking further funding from schools where they are already trying to do more and more with less and less will have a detrimental impact on the children in our schools as a whole as their offer is becoming more and more diluted”.

“Additional funding has already been taken from school’s budgets this academic year and schools are struggling to maintain the support and resources required for SEND children as numbers are growing. If this is to go towards the ARP developments, not all schools would use this resource and therefore, would lose out on the funding. is it worth analysing how much each school uses of their high needs block?”

School Forum members will be asked to vote on the proposal, if members vote Yes, they will be asked on the preferred methodology of calculation of the transfer as set out in the consultation. If School Forum members vote No, LA officers will report back to Council leaders and ask for a decision on whether to submit a request to the Secretary of State to disapply the decision of School Forum on this occasion.

5. Impact of funding, targets, and milestones

- a)** As has been the case with the current 0.5% transfer, if a second transfer from the Schools Block is supported, it will be ringfenced to support High Needs provision in schools rather than be used to reduce the High Needs deficit. Initial plans and future developments will continue to be informed by SEND working groups with school leader representatives.
- b)** In 2024/25 0.5% of the Schools Block was transferred to High Needs. This equated to £962,674. 100% of the Schools Block transfer was passported back to schools to support the ARP programme (£216,344) and exceptional funding requests (£577,891 to date the remainder of £178,439 will be spent on further requests by March 25) for those settings who developed their internal provisions to support a more specialist offer for cohorts of SEND children and young people
- c)** It is the intention of the Local Authority to passport 100% of the schools block transfer back to settings to support the revenue costs for the SEMH AP programme and to contribute towards the 25/26 round of exceptional funding.

6. Resource implications

- a) The impact of the transfer on individual school budgets is a supplementary document to this report but not part of this paper. The impact was shared as part of the consultation document with schools in October 2024.

7. Appendices

Report to Schools Forum

Item	13
Meeting Date	14 November 2024
Subject	DSG Management Plan Report (Termly Review)
Report Author	Emma Ingham - SEND and Inclusion Service Manager

Report purpose

To manage the increasing deficit within the Dedicated Schools Grant (DSG), a DSG Management 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. This report is an update on progress and will be a standing item for reporting to school forum whilst the plan remains.

Need for consideration

N/A

Need for decision

N/A

Contact Officers

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1. Background information and context

- a) 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.
- b) The DfE acknowledges the pressures which local systems are experiencing delivering special educational needs and disability (SEND) services and Calderdale Council has been working with the DfE as a partner within the national Change Programme.
- c) Until recently Calderdale has been one of the few LAs who have maintained balanced budget and 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.
- d) The current overspend within high needs for 24/25 financial year is projected to be in excess of £13M. Despite this, Calderdale still 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. However, The Local Authority are required to complete a DSG Management plan and report to the ESFA to outline how it intends to tackle the overspend and mitigate against further cumulative expenditure.
- e) LA officers have responsibility for the plan completion and meet with the ESFA termly. 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.
- f) Calderdale Schools Forum continues to be a key partner in developing the DSG Management Plan which is a DfE requirement for LAs in deficit. In addition, the progress of the DSG Management Plan is overseen by the High Needs Budget Deficit Reference Group. (HNBDRG)

2. Main issues for Schools Forum

November 2024 update

- a) The Autumn term ESFA Monitoring meeting took place on 9th October 2024. The LA has a set of actions to complete to support the completion of the Management Plan which is a dynamic document currently under review. LA officers are review and update this monthly and anticipate sharing the updated plan at January school forum.
- b) The High Access Needs Block Deficit Reference Group will continue to scrutinise sections of the plan and the actions the Local Authority are taking to mitigate the deficit with a view to making longer term savings. Work to date includes a deep dive on spend on out of area placements.
- c) The SEND and Alternative Provision Strategy is under consultation currently, and this sets out the wider strategic plan to improve SEND services and invest to transform services in our borough.
- d) 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; the creation of the Good Learning Places Panel and Exceptional Needs Panel; work on the capital programme; and the shared focus in Calderdale on clearly defining the ordinarily available provision for pupils with SEND in mainstream schools.

7. Appendices

[High needs funding: 2024 to 2025 operational guide - GOV.UK](#)

[DSG management plan: guidance for local authorities - GOV.UK](#)

[Special Educational Needs and Disabilities \(SEND\) and Alternative Provision \(AP\) Improvement Plan](#)

Report to Schools Forum

Item	14
Meeting Date	14 November 2024
Subject	De-Delegation of School Improvement Functions (Maintained Schools)
Report Author	Connie Beirne

Report purpose

- a) To provide members of the Schools Forum, with possible models of delivery during 2025/26 (1 year) to enable the LA to continue to deliver this statutory function for schools.
- b) For members to be able to make an informed decision based upon the provided costed models of delivery

Need for consideration

The effective use of maintained schools' funding in securing the local authority school improvement function through a robust and rigorous delivery model.

Need for decision

- a) Information is provided to support decision making by Schools Forum about future delivery and funding for the statutory school improvement function Calderdale needs to deliver to our primary maintained Schools causing concern.
- b) Agreement to de-delegate the funds required from the maintained schools' budget for 2025/26.

Contact Officers

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1. Background information and context

- a) The Calderdale model for school improvement is based on our strong partnership with schools. Through collective endeavour and for the greater good, schools in Calderdale have de-delegated funding to enable the provision of bespoke challenge and support. The school effectiveness offer is tailored to school's individual context and their position on the graduated approach, with intensive support being matched to the most vulnerable schools in order to support rapid improvement. It is through this joint work with school leaders, that the proportion of schools that are good and outstanding in Calderdale has continued to improve.
- b) Under Section 72 of the Education and Inspections Act Calderdale Local Authority has a statutory duty to monitor the effectiveness of all schools in its area (including academies and free schools) working with the Regional Director. As part of that duty local authorities should
- Understand the performance of maintained schools in their area, using data as a starting point to identify any maintained school that is underperforming, while working with them to explore ways to support progress;
 - Work closely with the relevant RD, diocese and other local partners to ensure maintained schools receive the support they need to improve;
 - Where underperformance has been recognised in a maintained school, proactively work with the relevant RD, combining local and regional expertise to ensure the right approach, including sending warning notices, and using intervention powers where this will improve leadership and standards; and
 - Encourage Good and Outstanding maintained schools to take responsibility for their own improvement; support other maintained schools; and enable other maintained schools to access the support they need to improve.
- c) Based upon our present risk assessment of Green (no concern), Amber (of concern to the LA) and Red (Of high concern to the LA). There are presently (November 24) 32 green, 3 red and 12 amber-maintained schools, including 4 schools with new headteachers. (15 in total needing additional support) There is an increased level of support for amber schools at up to three days allocation of support per term and for red schools up to four days of support per term. Having excellent relationships with our schools, means that 75% of primary schools completed their own school self-assessment sharing an honest appraisal of where their school was at and what, strengths, challenges and sharing of good practice they were in a position to offer.
- d) Risk assessments of all our schools (maintained and academies) are fluid and this means that following support from our SE team members or an Ofsted inspection, discussions with Cluster Officers, CEO's and/or the Diocese, risk ratings can alter. This will be agreed between the LA, headteacher and chair of governors at the school. During the autumn term so far, there is an amber school moving to a risk assessment of Red, due to the significant concerns displayed. However, we anticipate movement of at least

two amber schools to green during the spring term 2025. It is important, that there is flexibility within our model, as schools can sometimes face issues around leadership/staffing/governance with little notice and we need to be in a position to offer the support required.

- e) The very small School Effectiveness Team is made up of an interim Service Manager, a part time School Effectiveness Officer, a Business Support Officer and eight School Effectiveness Associates – four are existing headteachers, another three are retired heads who have led our schools previously. The remaining one is a consultant who has worked in the LA and with our schools previously. All are highly skilled with considerable experience and expertise between them. There are four Ofsted inspectors in the team. This has been recognised and appreciated by those heads, whose schools are of concern and by other staff in our schools attending the primary Subject Leader development programme, the New Headteachers network and those undertaking the numerous NPQ qualifications.
- f) Feedback on the work continues to be very positive. A survey completed by headteachers in July 2024 had a 76% response rate and emphasized the high quality of the service, excellent communication and significant impact of the work undertaken with our schools. Last year, as evidenced from our work, there continued to be an improving picture across Calderdale with forty-five maintained schools Good or Outstanding and only two requiring improvement. We are successful as we:
 - provide a consistent associate to work with a school,
 - work in partnership providing rapid support to secure improvement
 - 'Team around the school' meetings enable all the support to be tracked which is beneficial to all involved.
- g) Over time we see numbers of schools which require high levels of support reducing, as schools continue to move from the risk assessment of amber/red back to green as well as a small number of schools joining a MAT. Currently, there are four maintained schools (includes two secondary) who will be converting to academy status by September 2025. In recognition of this, during the year, further work will take place to review the costs and offer ahead of financial year 2026/27 and part of this will be to reduce costs through the appointment of the substantive SE Lead.
- h) Calderdale performance outcomes 2024 remain strong with GLD almost matching national, Phonics results above national, KS1 results increasing and not far from national and KS2 results just below national, due to some individual school/trust results.
- i) The SE Team work closely with Kirklees and Calderdale Teaching School Hub (C&KTSH) as well as the curriculum hubs of English, maths and Music and our research school. The overview of effective practice means that associates are often able to match highly effective practice to schools' improvement needs and thus facilitate school to school support. We continue to respond to queries from our academies and offer signposting to those,

particularly in difficulty. Support, training and advice also comes out of the successful cluster model in place in Calderdale where funding is provided for both academies and maintained schools to work in partnership. This SE associate model also sits well with the SI cluster model which all schools benefit from. The cluster model continues to play a significant role in delivering School Improvement on behalf of the LA. Real strength and impact continues to be seen through the impact cluster reports shared with members of the School Improvement Partnership Board.

- j) Our highly successful Primary Subject Leaders Development Programme, funded directly by our schools, continues to be delivered by existing Headteachers, including some SE Associates from within the borough. This supports and reinforces the system leadership model of providing school to school support. Following feedback from primary headteachers, we would also like to establish further sharing of good practice across Calderdale as possible workshops. The SE team are planning these sessions to run in the spring term 2025, with our school leaders showcasing this work.
- k) Two School Effectiveness Associates (SEA) working as part of the team continue to deliver the new Headteachers support package/network/mentor for up to 19 new headteachers including 3 Secondary autumn term 24 onwards, which is now funded by school clusters. Feedback so far from new heads, is incredibly positive and they can access the immediate information and support necessary. Headteacher wellbeing also features within our school clusters priorities. Nationally, more than 1 in 4 primary school leaders and more than 1 in 3 secondary school leaders leave within five years of appointment. (NAHT April 2024)

2. Main issues for Schools Forum

Need for consideration

- a) The effectiveness of the offer has been demonstrated by the continued improvements for vulnerable schools and feedback from school leaders and governor. We are presently at 89.5% good and outstanding schools compared to national at 90%. Ensuring schools remain at least good enables leaders and governors to be masters of their school's destiny, enabling them to make decisions about whether to remain maintained and to make choices if they wish to convert. Schools which are less than good under the current Schools Causing Concern Guidance are likely to face sponsored academization where choices about which trust they choose sit with the DFE.
- b) A School Effectiveness options appraisal exercise has been undertaken. The existing team continue to bring in traded income through Headteacher performance management, data agreements, commissioned work, cluster officer post and school reviews. However, despite this amounting to around **£54K**, much of this is spent on staffing of monitoring and moderation statutory assessment duties. The team will continue to publish this School Improvement offer for 2025/26, which is open to all Calderdale schools.

- c) The available budget for the School Effectiveness team in 2025/26 is **£54,720K** and includes:
- **£32,720** LA base budget - the local authority is unable to increase this, in line with most councils resource for children and young people is not matched to escalating service demand.
 - **£22K** traded income based upon our previous year's income
- d) Last year the amount per pupil for our primary schools for was agreed at £27.93. At the time of submitting this report we can only provide a provisional amount (included the reduced pupil number with PALT conversion 1/1/25) as Finance await this information in December 2024. We will be able to confirm these costs at the meeting in January 2025 but using provisional figures:
- Model 1 = £30.10 per pupil
 - Model 2 = £27.26 per pupil
 - Model 3 = £27.91 per pupil
- e) Staffing costs will rise in 25/26 by £2,221, with the forecasted pay award based upon 2.5% increase across all scales. However the substantive post will be advertised in the spring term and we hope to recruit to this post by March 2025, at the latest. The interim post holder's contract has been extended to March 2025.
- f) **Equalities impact statement.** The majority of schools causing concern are in levels of high deprivation with higher numbers of children who are disadvantaged as well as those with SEND. Out of the thirty schools (Maintained (15) and Academies (15), all are within the most deprived areas of Calderdale, including Ovenden, Illingworth and Mixenden, Warley, Todmorden and Sowerby Bridge. With the pandemic, the gap has widened for our vulnerable pupils. Putting resources in at the right place, right time will ensure the child's needs are met, so they can go on to meet their full potential.

3. Optional Delivery Models

- a) During autumn 24 and spring term 2025, we were awarded funding to provide one day of support to our Green maintained schools (35). This has been successful and Headteachers have valued this support. We have attempted to make the support provided be-spoke and this has been appreciated. Although Green risk assessed (32 at present), schools can become vulnerable due to changes in leadership, Ofsted grading, staffing, safeguarding etc. From experience, the schools that are often more vulnerable within an LA, are those that are outstanding and remained uninspected for a considerable period of time and those that have retained good for a significant period.
- b) Suggested **model 1** for delivery April 2025 – March 2026 (1 year)

- Staffing including on-costs:
 - Service Manager for Education Quality and Strategy (£104,373), 0.6 SEO (£62,442), full time BSO (£39,553),
 - associates to support red schools to get up to 4 days of support and amber to get up to 3 days of support per term (£86,625) and maintained green schools (34) x 1 day support across the academic year (£18,700K).

Total costs = £311,693 (LA amount = £54,720) (amount requested to be de-delegated = £256,973 by Schools Forum)

- c) Suggested **model 2** for delivery April 2025 – March 2026 (1 year) (reduced support to Amber schools, remaining the same for Red and Green schools)

- Staffing including on-costs:
 - Service Manager for Education Quality and Strategy (£104,373K), 0.6 SEO (£62,442K), full time BSO (£39,553)
 - associates to support red schools up to 4 days of support per term and amber schools reduced to 2 days of support per term (62,370). maintained green schools (34) x 1 day support across the academic year (£18,700K).

Total costs = £287,438 (LA amount = £54,720) (amount requested to be delegated = £232,718 by Schools Forum)

- d) Suggested **model 3** for delivery April 2025 – March 2026 (1 year) (no green schools support)

- Staffing including on-costs:
 - Service Manager for Education Quality and Strategy (£104,373K), 0.6 SEO (£62,442K), full time BSO (£39,553)
 - associates to support red schools to get up to 4 days of support and amber to get up to 3 days of support per term (£86,625)
 - NB if this model were to be chosen, green schools would need to receive their required support via the SI cluster model arrangements as detailed in the partnership framework document – October 2024.

Total costs = £292,993 (LA amount = £54,720) (amount requested to be delegated = £238,273 by Schools Forum)

4. Recommendations

- a) For School Forum members to recognise the successful delivery of the LA school improvement function during the last three academic years 2022 through to 2025. involving a smaller number of officer input as well as SE associates and look to continue to support and fund this model going forward

into 2025/26 to provide the stability needed for our schools causing concern and address our statutory duties.

- In choosing **model 1**, there is the same level of support currently provided for our maintained schools causing concern with a continued offer to our green schools.
- In choosing **model 2**, the schools causing concern continues to be the focus of the team's work but a reduction by three days per year for our amber schools. Green schools continue to get one visit per year.
- In choosing **model 3**, there is the same level of support for our schools causing concern without an offer to our green schools.

b) School Forum members will need to consider the changing educational landscape and the need to work in partnership with all stakeholders to deliver the best education for all the borough's children. The risks implicit in removing the support for green schools is that the evidence that supports the school's self evaluation is not seen and as a result some schools may be more at risk of decline. Additionally, some of the best practice in these schools will also not be seen, meaning that the team will be less able to broker school to school support by matching excellent practice in one school to development needs in another.

c) To ensure that all providers are available to support our schools, it is recommended that schools consider **model 1** so we can continue to move from a rating of 89.5% good or better schools exceeding the national figure of 90.4%, ensuring all our Calderdale children can flourish in highly effective local schools.

5. Reasons for Recommendations

For a decision to be taken on a chosen model, so the necessary changes, required can be put in place ahead of a 1 April 2025 start date.

6. Resource implications

All professionals, funding and resources to be in place by 1 April 2025 for the summer term onwards. Appointment made to the service manager post.

7. Appendices

Report to Schools Forum

Item	15
Meeting Date	14 November 2024
Subject	De-Delegation of Union Facilities Funding 2025-26
Report Author	Hamish Heald/Jane Davy

Report purpose

For Forum members to vote on whether funds for Union facilities time for maintained Primary and Secondary funds should be de-delegated in 2025/6.

Need for consideration

Forum members are required by the EFSA operational Guidance each year to vote whether these funds should be de delegated. Appendix 1 shows a request from the teacher unions to increase the base funding.

Need for decision

- a) Appropriate Forum members should vote on whether the funds for union facilities time for maintained primary schools in Calderdale should be de-delegated in 2025/26.
- b) Appropriate Forum members should vote on whether the funds for union facilities time for maintained secondary schools in Calderdale should be de-delegated in 2025/26.
- c) Forum members to vote on what the union facilities rate should be increased to per pupil for maintained schools in Calderdale to support the work of the unions.
- d) Forum members to vote on whether to use funds from the Central Block DSG to cover the current funding deficit, either fully or partly. This would be a one-off request of £21,939.38 and will be funded from the £73k contingency that has been set aside by School Forum. This will relieve pressure on finances and effectively allow for a reset without it affecting schools that are paying in.

Contact Officers

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1. Background information and context

- a) The EFSA produces school funding operational guidance, and these provide for local authority schools forums to annually take a decision on whether specific funds should be de-delegated and retained by a local authority to provide a joint service on behalf of all maintained schools. This arrangement is not applicable to academies, who make their own arrangements, but academies may choose to buy into any centrally arranged joint service.
- b) Last year Calderdale's schools Forum voted to continue to de-delegate funding for union facilities time for both primary and secondary schools (two separate votes). **The indicative funding available for 2025/26 is shown in the table below, this is based on Oct 23 pupil numbers and totals £39,509. The budget will be amended if there are any further academy conversions in 2025-26. (However, it assumes 3 conversions planned for 1st Jan 25 will happen)**

Maintained Schools	Union Facilities Time
Primary Schools (41)	34,714
Secondary Schools (1)	4,795
TOTAL (50) Schools	39,509

The Local Authority administers the 'de-delegated' budget, the collection of contributions made by academies, approval, and release of funding to unions or authorisation of any claims, and monitoring of costs and usage of individual union allocations. The Local Authority receives a management fee for this work of £4,000 from these funds. The administration of the TU facilities agreement is currently under review and this management fee is being negotiated to either be removed or be set at a lower rate.

2. Main issues for Schools Forum

- a) The union facilities time service being provided here is not the provision of "school" based representatives (such representatives are usually provided with reasonable time within school to undertake such work). This service is for the provision of "local" representatives. The service to be provided by the unions is set out in Appendix 1.
- b) Academies and special schools make their own arrangements for union facility time. As at April 2024, 21 of Calderdale's academies and 3 Special Schools were buying into the traded service offered by the unions. If they all remain in the scheme, this would generate indicative income for the union facilities time of £34.6k in 2025/26. As far as we are aware, all current academies and special schools will continue to pay in, and the schools in the newly forming The Pennine Alliance Learning Trust will also continue with the arrangement.

Crossley Heath are rejoining and we are hopeful that others, will follow. We have changed our 'opt in' agreement for academies to an 'opt out' approach, so if academies wish to opt out, they must now demonstrate how they are fulfilling their legal responsibilities, as unions have expressed concerns that many of them who don't pay in may not be currently fulfilling those responsibilities.

- c) The total de-delegated budget, plus academy income, is then earmarked as an allocation for each union and allocated on either an Invoice or claim provided.
- d) The Unions are again requesting that Calderdale maintained schools support the de-delegation of the funding for 2025/26 for the services to be provided in the attached paper.
- e) Calderdale's Federation of Teacher Unions have discussed the proposal of increasing the sum available to support the work of the unions through increasing the rate charged per pupil please see attached paper outlining the proposal for school's forum to consider.
- f) It will be for maintained primary and secondary school representatives only on Schools Forum to vote on whether funding for union facilities time should be de-delegated in 2025/26 (by a separate vote of primary and secondary). It will be important for voting members to represent the wishes of their constituent groups. In the result of a tied vote the Forum chair has the deciding vote.
- g) It has previously been the case that the interested groups of Head Teachers and governors have supported the de-delegation of funding for union facilities time as the view has been expressed that all schools need to work with Unions to reduce the likelihood of costly employment disputes.

3. Recommendations

- a) Appropriate Forum members should vote on whether the funds for union facilities time for maintained **primary schools** in Calderdale should be de-delegated in 2025/26.
- b) Appropriate Forum members should vote on whether the funds for union facilities time for maintained **secondary schools** in Calderdale should be de-delegated in 2025/26.
- c) Appropriate Forum members should vote on what the union facilities rate should be increased to per pupil for maintained schools in Calderdale to support the work of the unions.

- d) Appropriate Forum members to vote on whether to use funds from the Central Block DSG to cover the current funding deficit, either fully or partly. This would be a one-off request of £21,939.38 and will be funded from the £73k contingency that has been set aside by School Forum. This will relieve pressure on finances and effectively allow for a reset without it affecting schools that are paying in.

4. Reasons for recommendations

To comply with the operational guidance issued by the EFSA on school funding.

5. Impact of funding, targets, and milestones

If there is a decision made by the schools Forum not to continue to de-delegate the funding for the Teacher Trade Union Facilities budget this would consequently lead to the collapse of the local Calderdale facilities arrangements as there would be no money to pay for local officers.

It should be noted that arrangements such as this are commonplace and in use throughout the country.

Point 6 in the appendix gives a full explanation as to why this situation should be avoided.

6. Resource implications

The current budget is allocated to schools using pupil numbers in each sector. This provides a funding rate of £3.44 per pupil in the Primary Sector and £4.75 in the Secondary one. There are currently 8,744 pupils in the Primary Sector and 875 in the Secondary Sector.

7. Appendices

Appendix 1

De-delegation of union facilities time.

A Joint paper on behalf of the Federation of Calderdale Education Unions

1. Purpose of Document

The purpose of the paper is to provide information as to how the teacher union facilities time has operated since de-delegation was first approved in October 2012 in order that Schools Forum can review that system.

Throughout the document the 'statistics' refer solely to the duties carried out by the following unions NEU, NASUWT and NAHT.

2. What does the law require?

There are several pieces of legislation which apply to the provision of facilities to discharge trade union duties. These include the Trade Union and Labour Relations

(Consolidation) Act 1992, the Health and Safety at Work etc Act 1974 and the Safety Representatives and Safety Committees Regulations 1997.

In Calderdale the decision to de-delegate funding in primary and secondary maintained schools, the decisions by a number of Academies to 'buy-in' and decisions by a majority of the Special Schools to 'buy-in' enables funding to be made available so that facilities can be provided as per the legislation, in those schools which are 'part of the system'.

These facilities are potentially provided to all the teacher trade unions in Calderdale and are currently claimed, in proportion to declared membership, by (order of size).

3. Schools that do not contribute

However, the local (Calderdale-level) branches of the teacher trade unions are unable to provide legal representation, advice, and support within school hours to their members in schools that do not 'buy-in'.

4. Trade union duties

The trade union duties that might be undertaken on behalf of members include:

- disciplinary hearings,
- grievance hearings,
- informal capability meetings,
- formal capability meetings,
- sickness absence monitoring meetings,
- terms and conditions of employment,
- consultation meetings on changes to working arrangements,
- investigations,
- termination of employment,
- suspension of employment,
- the duties of employment of a member,
- the duties of employment of a group of members,
- advising and representation with regard to flexible working
- negotiation and consultation, and other procedures, relating to the above matters, including the recognition by employers of the right of a trade union to represent members in such negotiation or consultation or in the carrying out of such procedures,
- consultation relating to TUPE,
- negotiations under TUPE,
- Section 188 redundancy notices,
- investigate member's complaints regarding health, safety, or welfare at work,
- carry out health and safety functions such as investigating potential hazards,
- making representations to the employer on the above,
- representing members in workplace consultations on Health & Safety,
- attending safety committee meetings

- representing members at meetings,
- providing information and guidance to school reps,
- (union learning reps) carrying out 'relevant learning activities',
- facilitating compromise (settlement) agreements.

During the past year the unions carried out on one, or more than one, occasion all the duties listed above. In addition, all the local union representatives with time funded by facility time undertook training during the year.

In addition to the above, the education trade unions have been involved in extensive consultations during the last year with both HR in the LA and other providers on a number of policies and advice. This enables HR providers to be able to offer schools policies which have already been consulted upon with the teacher trade unions. This has the clear advantage that should a school adopt such policies it can do so in the knowledge that it is not going to be 'in dispute' with the trade unions.

5. Scope of Support and Advice

During the past year the teaching unions have provided advice to, supported, and represented members in many maintained schools as well as many academies and special schools that 'buy into' the system.

It is worth noting that schools may well be unaware that union members in their school have sought advice from their union as frequently advice consists of telephone calls, emails, or meetings off the school premises. Union advice given in such a way, where it clarifies a member's rights, entitlements or duties, or resolves a potential dispute without recourse to any school procedure can prevent any unnecessary conflict/dispute in school.

This preventative work constitutes a considerable amount of the casework undertaken by local officers, this being higher in schools without a school representative.

6. The request for continued de-delegation of the facilities budget.

The request from the teacher trade unions is to continue for the year 2025/26 the de-delegation of the trade union facilities budget, as the system of teacher trade union facilities currently operating in Calderdale demonstrably continues to work effectively and efficiently.

In a national context the government recognises that there are significant benefits to both employers and employees when organisations and unions work together effectively to deliver high quality public service. This requires public sector organisations who employ over 49 Full Time Equivalent Staff to publish information relating to trade union usage/spend.

If there is a decision made by the schools Forum not to continue to de-delegate the funding for the Teacher Trade Union Facilities budget this would consequently lead to the collapse of the local Calderdale facilities arrangements as there would be no money to pay for local officers.

Duties currently undertaken by the trained, experienced Local Officers of the recognised unions would then have to be undertaken at a school level by school-based representatives.

This would mean that every school would have to:

- fund the costs of having a fully trained and accredited representative for every union.
- school representatives would need to be trained to a much higher level of expertise than is currently necessary.
- initially each representative would be required to undertake a three-day training course for which they would be entitled to time-off with pay.
- further training would then be required on an annual basis.
- plus, each union would be entitled to appoint a health and safety representative and a union learning representative, both of whom would be entitled to paid time-off to undertake the necessary training.

Following the training each representative would then be entitled to reasonable time-off, with pay, to carry out their duties.

Consequently, all of the above would

- place a considerable financial burden on every school.
- be much more disruptive to the smooth running of schools and to the learning of the pupils, as each time a union representative was required to represent a member in school, carry out a health and safety inspection or carry out their ULR role, this would require the representative to be released from their teaching duties.
- fewer issues would be resolved informally, resulting in a significant increase in costs to schools and workload for school leaders, governors, and LA officers. Disciplinary, grievance and capability issues would be more likely to escalate, with cases much more likely to reach employment tribunals.

The current system of Calderdale-wide representatives on paid facility time means that such disruption, to the teaching and learning, is minimised and is clearly also much more cost-effective.

The current arrangements efficiently pool the cost risk to individual schools as well as allowing trade unions to provide more effective support through trained and experienced representatives.

Please note - Union subscriptions are used to provide support to all members of the trade unions at a national and regional level as well as providing legal support where this is necessary. Union subscriptions are not used to provide

facility time which is an entitlement under legislation to be provided by the employer.

7. The request for the consideration of an increase in the amount of facility time funding

The current situation

- a) The facilities time 'pot' has been running at a deficit in recent years and there is now a significant amount that needs to be recovered: £21,939.38. There are a number of reasons for this deficit building up, including:
 - For many years the amount requested per pupil didn't increase at all
 - In recent years there have been significant pay increases and increases to teachers' pension rates
 - There have been significant changes to the personnel who work on managing the facilities time 'pot' in recent years, including a change in Local Officers who now all opt into the Teacher Pension Scheme.
 - The number of academies not paying in has risen, an issue that is being addressed and that we are already having successes with – some schools that had previously stopped paying in are now rejoining the scheme. Typically, the proportion of schools who pay in to these schemes are higher than in Calderdale, 100% in many places. We are working hard to achieve the same.
- b) Calderdale charges less than many neighbouring local authorities, for example: Kirklees - £6, Leeds - £6.15, Blackburn £7.82, Manchester £5.98, Bradford - £5. Additionally, Calderdale has lower rates set for primary schools, whereas most authorities charge the same, higher rate across both sectors.
- c) There are concerns from elected local union officers who undertake trade union duties funded by the de-delegated facilities budget, regarding the amount of the budget providing insufficient funds to enable local officers to undertake the duties and legal representation required by schools. This appears to be due to the following factors:
 - The amount of casework needing union officer time is increasing. While changes to legislation and statutory guidance to employers prompts some of this increase, the largest part is due to the current school funding situation.
- d) The rate of £3.44 per primary and £4.75 per secondary pupil was agreed by school's forum in 2024 for the academic year 2024/25.

Our recommendation for this year and moving forward

In order to reduce the deficit, grow the 'pot' to allow for reasonable facilities time being made available to Local Union Officers and also safeguard against future

issues, we are asking Forum members to commit to increasing the per pupil amount.

Options 2 and 3 'phased' approach to increasing the per pupil amount will allow schools and academies to accommodate the increase into their medium to long term budget planning.

We would like to suggest 3 potential options that will bring per pupil spending closer in line with other local authorities and would create more sustainable FT arrangements for Calderdale schools and academies:

Option 1: A 'one off' 30% increase (+ inflation) for 25/26

25/26 - Primary Per Pupil Charge: £4.47

25/26 - Secondary Per Pupil Charge: £6.17

Option 2: A 3 year 10% phased increase (+ inflation) from 2025 – 2028

25/26 - Primary Per Pupil Charge: £3.78

25/26 - Secondary Per Pupil Charge: £5.22

Option 3: A 5 year 6% phased increase (+ inflation) from 2025 – 2030

25/26 - Primary Per Pupil Charge: £3.64

25/26 - Secondary Per Pupil Charge: £5.03

Additionally, we are asking Forum members to consider allocating funds from the Central Block DSG to cover the current funding deficit, either fully or partly. This would be a one-off request of £21,939.38 and will be funded from the £73k contingency that has been set aside by School Forum. This will relieve pressure on finances and effectively allow for a reset without it affecting schools that are paying in.

Conclusion

The teaching profession continues to be one of the most unionised professions in the country and consequently the recognised teaching unions in Calderdale are able to represent over 99% of the teachers in Calderdale.

The current system of effective representation by trained and experienced local representatives has been demonstrated to be an effective and efficient process and

should continue to the benefit of all concerned. It is widely used in local authorities all over the country.

A decision not to de-delegate for a further year would inevitably lead to an increase of costs to the majority of schools and, potentially, to all schools as well as a considerable worsening in 'industrial relations' to the detriment of all concerned. Staff welfare and wellbeing would also be negatively affected, further impacting the current recruitment and retention crisis.

With regard to the content of this report the Calderdale teaching unions are requesting to continue to provide a local level of union representation and that the cost per pupil be increased to match other local authorities. We are also asking for funds from the Central Block DSG to be released to cover the budget deficit.

Compiled by the union officers of the Calderdale Federation of Education Unions.

Report to Schools Forum

Item	16
Meeting Date	14 November 2024
Subject	Options Paper on Contingency Fund and Calderdale Headteachers Health and Wellbeing strategy 2025-2028
Report Author	Connie Beirne Interim Service Manager for Education Quality and Strategy

Report purpose

To provide members with a local and national picture of the recruitment and retention crisis of our primary headteachers and the work going on across Calderdale, to address this area of concern.

Need for consideration

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

Need for decision

For School Forum members to decide to award £5K alongside contributed funds from the six primary school clusters for the development of a 'Primary Health and Wellbeing strategy' for implementation in September 2025 and as part of this, for a conference to be able to go ahead on the 7 February 2025.

Contact Officers

Connie Beirne- Interim Service Manager for Education Quality and Strategy
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1. Background information and context

- a) Nationally, we know that the current school conditions of our school leaders, teachers and support staff are not sustainable. Data from the Education Support Teacher Wellbeing Index (May 2024) and corroborated more recently by the Working Lives of Teachers tells us that 78% of all education staff report being stressed and this rises to 89% of all leaders and 95% of headteachers. Schools are essential public institutions at the heart of their communities and within some communities, is the last public institution left. The value of schools and schooling cannot be overestimated. We saw this through the pandemic where schools exercised a duty of care, responding to a wider set of needs in the community. We need to demonstrate the ethics of being a good employer in recruiting, looking after and retaining our future leaders.
- b) Our local statistics in Calderdale, show a continued rise in headteachers leaving the profession since 2022 and this is replicated nationally. Typically, in Calderdale, there would be a change around of between 8-10 headteachers, including those who had chosen to retire.
- c) There are three areas nationally that we all need to focus upon and these include: **prioritising professional development, building relational trust and improving working conditions**. The culture, climate and conditions in our schools need to be addressed.
- d) In 2022, I submitted a bid to the Calderdale School Improvement Partnership Board, to ask for funding (£30K) to set up a new headteacher's network and also to be able to award up to 10 new headteachers, £3K each to help towards the costs of any immediate identified priorities they needed to address. This ran across both academies and maintained schools. Our previous experience had often resulted in new headteachers finding some pressing priorities that needed to be addressed, with the issue being that without any available funds to address them immediately, this often led to the school becoming of more concern, as well as a possible poor judgement should they be due an Ofsted inspection. The approach adopted worked effectively and we found that by December of that year, all the monies had been allocated and new heads were being appointed for January 2023, so could access the network but funding was no longer available. At the review point in March 2023, Partnership board members could see the real impact made, but weren't in a position to award further funding. This is when, we turned to our school clusters to source the appropriate funding and support for new headteachers working in Calderdale.
- e) Our school clusters represent the best practice in terms of system leadership and school improvement. Each of these clusters for the last three years, have continued to seek to address the health and wellbeing of their leaders. It also needs to be noted, that we have different models operating in our schools such as Executive Headteachers/Principals, Headteachers, Heads of School

etc. Clusters already contribute towards the cost of the new headteachers network each year and continue to provide, a safe space to discuss challenges in our schools, peer support and coaching.

- f) Our leaders continue to face many difficult challenges in our schools, including high levels of deprivation, falling rolls, deficit budgets, difficulties with recruitment and retention of all staff, a fall in pupil attendance (particularly since the pandemic) and now vexatious parents.
- g) Starting this September 2024, we had nineteen new Headteachers to our Calderdale schools. Last year, it was 18 and the previous year 2023, it was 20, so it is unlikely to reduce anytime soon.

2. Main issues for Schools Forum

- a) Despite the recruitment and retention concerns, our Leaders continue to offer a good educational experience, good pupil outcomes and effective preparation for transition to high schools.
- b) Our Leaders effectively engage regularly with our stakeholders to continue to improve the educational offer for our children
- c) Our leaders need to continue to feel fully supported across our Calderdale system as you will agree they are doing an outstanding job. However, last year, we lost at least four headteachers, due to burnout.
- d) We await to see what our new government will initiate in terms of the recruitment and retention crisis in Education but we need to act now in Calderdale to secure our existing leaders and those of the future.

3. Recommendations

Calderdale Primary Heads Association have been clear they want a central focus on headteacher wellbeing. This has grown out of work started in the Todmorden Cluster, but has been agreed to be a priority by all the primary clusters. To take this forward, there are three actions we are looking to address:

- On Friday 7 February 2025 to host a 'Calderdale Primary Headteachers Wellbeing conference' with at least 80 headteachers in attendance
- The development and Implementation of a Headteachers health and wellbeing strategy 2025-2028
- At the CPHA July 2025 conference, the strategy will be launch for a September 2025 implementation, as this theme will continue to be discussed and addressed.

4. Reasons for recommendations

We want to continue to embrace the Calderdale 2024 vision of a happy, caring and supportive place to work with successful outcomes for all our children and young people.

It would be good to be known, as employers who have networks, support systems in place for new headteachers joining us in Calderdale alongside our existing leaders.

Professor Becky Francis CBE, following research around recruitment and retention undertaken by the Universities of Durham and Warwickshire (June 2024) stated, that 'effective school leadership and a positive school culture is especially important for keeping teachers in socio-economically disadvantaged schools'. The research confirmed how crucial good leaders are for keeping teachers in the profession and thus our leaders of the future. We need to support a facilitative organisational climate for recruitment and retention in our schools.

We plan to host a **Headteacher's health and wellbeing conference on Friday 7 February 2025**. Primary headteachers agreed at CPHA on 24 October 2024, that out of cluster funding awarded by Schools forum, they would contribute £30 per headteacher, which gives a total of **£2,520**. Clusters have set their priorities for 24/25 and have already allocated much of the funding. They are held to account through a rigorous and robust system.

The costings are as follows based upon eighty headteachers attending:

- Venue, including refreshments = £2,051
- Morning guest speakers from the Education Support Charity costs are being fully covered by NAHT
- Afternoon guest speaker/s TBC at the time of submitting this paper, but costings likely to be = £2500
- Admin/organisation/small memento = £900
- Total costs = £5,451

We are asking for a contribution of £2,931 towards funding the conference from Schools Forum.

We plan to develop and implement a '**Calderdale Headteachers health and wellbeing strategy 2025-2028**' to be implemented in September 2025. Costs associated with the production of this strategy are largely admin, headteachers time and resource costs. The costs which we seek to undertake this work is £2,069.

The total funding request is £5000.

5. Impact of funding, targets, and milestones

Primary Headteachers working within school clusters really value the funds they already receive from schools forum. However, funds continue to be stretched as far as possible in enabling clusters to undertake the necessary improvement work across their group of schools.

The award of the additional £5K, would enable us to build upon the existing good practice in place, provide a conference to reinforce to our leaders how valued and supported we want them to be and develop a longer-term strategy for Calderdale in being able to recruit and retain the best leaders for our children.

In terms of monitoring this work and ensuring milestones are met, the task group will report to the Partnership Board meetings calendared for December 2024, March and July 2025.

6. Resource implications

Venue, speakers and all resources in place for the conference to take place on the 7 February 2025, and the Calderdale Headteachers health and wellbeing strategy to be developed and launched at the CPHA conference in July 2025 for implementation from September 2025.

7. Appendices

<https://www.educationsupport.org.uk>

<https://www.naht.org.uk>

<https://educationendowmentfoundation.org.uk>

<https://www.nga.org.uk>

<http://www.gov.uk/guidance/education-staff-wellbeing-charter>

Schools Forum

Work Programme 2024/25

Prepared by
Jemima Flintoff, AD Education and Inclusion

***Reports are to be condensed to two pages where possible**

Meeting date	Reports	Officer	Report for:	Deadline for papers
Meeting Thursday 14th November 2024	Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	Wednesday 30th October
	Review of Schools Forum Constitution including an update on the CMBC Schools Academic Year 24/25 (Maintained/Academy)	Ian Hughes	Consultation / Decision (verbal)	
	Indicative Schools Funding Formula	Jane Davy	Consultation	
	Growth Fund and Falling Rolls	Jane Davy	Decision	
	Proposal to move another 0.5% from Schools Block into the High Needs Block	Jane Davy Emma Ingham	Decision	
	DSG Management Plan Report (Termly Review)	Victoria Coyle Emma Ingham	Update / Clarification	
	The School Improvement De-Delegation Request (Maintained Schools)	Connie Beirne	Decision	
	De-Delegation for Facilities Time (Maintained Schools)	Jane Davy	Decision	
	Options Paper on Contingency Fund	Connie Beirne	Decision	
	Education Function for Maintained Schools - Health & Safety funding request	Paul Greenwood Lee Broadbent	Decision	
	Scheme for Financing Schools (Maintained Schools)	Jane Davy	Consultation / Decision	

Meeting date	Reports	Officer	Report for:	Deadline for papers
	Education Function for Maintained Schools - Governor Support funding request	Debby Simpson Martyn Sharples	Decision	
Meeting Thursday 16th January	Cluster Paper			Monday 16th December
	Growth Fund and Falling Rolls			
	CSSB			
	High Needs Block			
	Early Years			