

# Schools Forum

**Date:** 16 January 2025

**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 10

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 (TLT)
<b>Academy Bursar x2</b>	Ivan Kuzio (Trinity MAT)
	Adam McNichol (Hebden Royd)
<b>Roman Catholic</b>	Brenda Monteith (Highbury School)
<b>Church of England</b>	Vacant
<b>Calderdale Federation of Education Staff Unions</b>	Hamish Heald (National Education Union)
<b>Post 16 Representative</b>	Karl Veltman (Calderdale College)
<b>Early Years Representative x2</b>	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 14 November 2024**
5. **Election of Chair and Vice Chair**  
Verbal / Decision **Karen Morley**
6. **Review of Schools Forum Constitution and membership**  
Verbal Consultation / Decision **Ian Hughes**
7. **De-Delegation of Funding 2025-26**  
Decision **Jane Davy**  
**Hamish Heald**
8. **Early Years Funding Formulae and Centrally Retained Funds 2025-26**  
Decision **Martyn Sharples**
9. **Approval of Central School Services Block DSG for 2025-26**  
Decision **Steve Drake**
10. **High Needs Block Recovery Deficit Plan**  
Information **Emma Ingham**
11. **Growth Fund & Falling Rolls**  
Information **Jane Davy**
12. **Update on School Funding Formula**  
Information **Jane Davy**
13. **Update on Maintained School Balance**  
Information **Jane Davy**

#### **14. Any Other Business**

**Chair**

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

[CalderdaleSchoolsForum@calderdale.gov.uk](mailto: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.

#### **15. Future Dates**

**Jemima Flintoff**

16 January 2025

24 February 2025 (Exception Meeting)

24 April 2025

3 July 2025

All meetings will start at 4pm

Venue: Virtual Teams Meeting

## **CALDERDALE SCHOOLS FORUM**

### **14 November 2024 – Virtual Meeting Via Teams**

#### **PRESENT:**

**Karen Morley** (Academy) – Co Vice Chair  
**Mungo Sheppard** (Primary Maintained)  
**Lauren Watson** (Primary Maintained)  
**Brenda Monteith** (Roman Catholic)  
**John Eccleston** (Academy Primary Governor)  
**Stephen Baines** (Academy Secondary)  
**Stuart Hillary** (Academy Secondary)  
**Karl Veltman** (Post 16 Representative)  
**Debbie Sweet** (Special School)  
**Dan Burns** (Academy Primary)  
**Phil Hannah** (Academy AP)  
**Gareth Morris** (Primary Governors Maintained)  
**Richard Horsfield** (Academy Secondary)  
**Rachel Harling** (Academy Primary)

#### **IN ATTENDANCE:**

**Jemima Flintoff** (AD Education and Inclusion)  
**Amanda Farron** (Senior Finance Officer - Observing)  
**Connie Beirne** (Interim Service Manager for Early Years and School Strategy and Performance)  
**Emma Ingham** (SEND & Inclusion Service Manager)  
**Hamish Heald** (Union Representative)  
**Ian Hughes** (Legal Officer)  
**Mick Burns** (Union Representative - Observing)  
**Jane Davy** (Finance Manager)  
**Martyn Sharples** (Senior Finance Officer)  
**Victoria Coyle** (SEN Manager)  
**Lee Broadbent** (Health, Safety & Wellbeing Manager)  
**Debby Simpson** (Governor Support Officer)  
**Steve Drake** (Finance Manager)  
**Richard Morse** (School Organisation & Access Manager)

#### **APOLOGIES**

**Andrea Dyson** (Early Years Rep)  
**Cllr Wilkinson** (Cabinet Member – Observing)  
**Denise Gwizdak** (Early Years Rep)  
**Gill Shirt** (Secondary Governor Maintained)  
**Louise Downing** (Primary Governors Maintained)  
**Adam McNichol** (Academy Bursar)  
**Ivan Kuzio** (Academy Bursar)

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

No substitutes were nominated.

**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 the Calderdale Partnership Improvement Board  
Karen Morley is a trustee at Together Learning Trust, representing primary academies including Scout Road. She is a governor at Christ Church Pellon and trustee and Burnley Road Academy.

Rachel Harling is a trustee at Together Learning Trust and a governor at St Augustine's School which is part of Learning Accord Multi Academy 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 – Calderdale's Senior Finance Officer  
Mick Burns – National Education Union

**4. Minutes of the Schools Forum held on 27 June 2024**

David Graham had an action to approach the special schools cluster and to gain a representative for High Needs group which has been completed

Capital projects on special schools in relation to the School Rebuilding Programme will be an agenda item at the meeting in January.

The minutes were approved by the Vice Chair and forum members

**5. Election of Chair and Vice Chair**

No members of Schools Forum nominated themselves to take on the role of Chair and Vice Chair. The current Vice Chair agreed to lead the meeting today and strongly encouraged members to put themselves forward for the meeting in January.

**6. Review of Schools Forum Constitution including an update on the CMBC Schools Academic Year 24/25 (Maintained/Academy)**

Ian has consulted the constitution review and commented that even though the document was from 2021, he stated that this document is still fit for purpose and asked if there are any concerns from forum members then to let him know.

The Vice Chair highlighted that once we have the Multi Academy Trust (PALT) established there will be a different dynamic, there will need to be a review of the representatives on

Schools Forum. The Vice Chair agreed to review the constitution to check it is still fit for purpose.

## **7. Education Function for Maintained Schools - Health & Safety funding request**

Martyn Sharples Q: What schools would Lee be servicing from this funding?

The schools that are to stay maintained, 41 community and 3 special schools totalling 44 schools.

Vice Chair Q: Does the costing consider the schools that will convert to academies? I have been assured Calder High school and associated schools will have been considered. In the guidance it states if the school does convert to an academy and money is taken, this should be paid back.

It is assumed this would be the case if a school choose to continue to receive the service as an academy they would have to pay on a commercial basis. Calder High school presently pay as part of the traded service. If Todmorden High school convert to an academy after the 1<sup>st</sup> April 2025, the money would stay with the LA until September 2025. After the 1<sup>st</sup> September 2025, it is believed the LA keep the money for the full year and school will be entitled to the service.

Vice Chair Q: Dow do you take this from the budget? Do you remove pro-rata pupil basis from the maintained schools?

JD - This is different to de-delegation as every school receives their allocation. This is deducted on a per pupil basis and will not be included in the Individual School Budget Share figures, the estimate is £4.10 based on £40k in October 2023, not including the 3 academies. Yes, the vote is for all maintained schools.

**Vote for all maintained school for the Health & Safety finding request:**

**Approve - 3**

**Oppose - 1**

## **8. Education Function for Maintained Schools - Governor Support funding request**

Vice Chair Q: Does this include the present secondary maintained schools? Has Calder High and Todmorden High leaving us been considered? Similarly, do the calculations consider the primary schools that will have academised by next financial year?

Yes, it has been taken into account because last year £9503 was the figure for subscription to NGA for Standard Membership and Learning Link and we are asking for £8,752 for this year. I also take into account that we have Federations, and this is 1 governing body rather than one for each school. I have not been given a figure from NGA for the cost of what they will charge us this year as they don't know yet but, they have promised me I will be the first to know when they do. Last year this was a significant rise. For next year, we have put for subscriptions to NGA: This year's cost (£221) for 39 schools (taking off Calder Trust, Tod High, Midgley and Old Town) = £8619, added £133 as a possible rise in cost for NGA totalling £8752. Overheads have then been added. Regarding this and the other part of my statutory duty (LA appointments) - £5815 is for my time to undertake the work involved. £2913.49 for overheads

Vice Chair Q: Are special schools included?

Yes, they are included. We have a statutory duty to these schools and are included in the prices.

Vice Chair Q: What would be the per pupil amount and what is the cost per school/amount to be deducted from each of their budgets?

Based on current pupil numbers, it will be £1.77 per pupil. This will change when the October 2024 PLASC data is received.

**Maintained schools were asked to vote. Schools Forum members unanimously agreed to the Governor Support Funding request.**

## **9. Indicative Schools Funding Formula 2025-26**

At the time of the meeting, the ESFA have not released the indicative funding. The MFG has been reduced from 0.5% to 0% and the LA are proposing to continue the MFG at the maximum amount allowed.

Schools' Forum members unanimously agreed to the LA applying for the MFG disapplication.

**School forum members unanimously agreed to bring the PFI funding back in line with the LA increases and reduce Basic entitlement to fund this increase**

## **10. Growth Fund**

Schools Forum are being asked to vote to agree on what to do with the carry forward money and are asked to vote on this in item 12 and if this is to be put towards the 0.5% transfer. It was noted that school forum members agreed with the approach by the LA to put any excess growth fund towards the 0.5% transfer.

## **11. Falling Rolls Fund**

Analysed the data, not expecting any schools to be in receipt of falling rolls. If we are in receipt on the funding, would like to put towards the 0.5% transfer. It was noted that school forum members agreed with the approach by the LA to put any excess falling rolls fund towards the 0.5% transfer.

## **12. Proposed School Block Transfer 2025-26**

This will reduce all maintained school budgets by £1million the basic entitlement will be adjusted first, followed if necessary by free school meals, FSM6 and then lower priority attainment. Any growth fund and falling rolls fund received by the LA will be used towards the 0.5% transfer.

Emma Ingham assured Schools Forum that every single aspect of the transfer will be put back into schools and the High Needs Reference Group will be monitoring this. The consultation for this transfer showed a 50/50 split from schools. Schools Forum are to be reassured that this is not the only mechanism being worked on over the next 12 months. There are risks of pushing this into exceptional funding. The LA are trying to improve



inclusion in mainstream schools and the LA is supporting settings with this. The funding will predominantly be spent on the AP Strategy.

Gareth Morris Q: Do you have an estimate of what the Calderdale's share of the additional £1bn in the High Needs Block is likely to amount to?

JD-This looks to be around 6% of the HNB. A college in Bradford said "Of the £1bn more for high needs, **only about 60% of this seemingly will go into the HNB for local authorities to use**. 40% will be taken by continuing separate high needs grants out to special schools and AP. The DfE has said that HNB allocations will work between a 7% pp floor and a 10% pp ceiling in 2025/26. So, this does mean more money, but the sums involved here are not massive in terms of fundamentally improving our HNB forecast. Whilst the DfE has said that additional funding will be provided for schools for the NI increase, it is not at all clear whether additional funding will come to local authorities for our increased NI costs direct and indirect – direct increased central staffing costs (especially in the HNB) and indirect increased charges from independent schools looking to recover their higher salaries costs."

John Eccleston expressed the view that there is a lot currently happening to help Calderdale be more able to cope with the increase in children with complex needs. John is concerned he doesn't know how this is being managed in terms of a very complex change in situation for numbers and the plan. He highlighted that primary head teachers will show concern around anything that takes money from their schools.

Emma reassured Schools Forum that the DSG Management Plan and High Needs Reference group will demonstrate their plans for this. This will show unmitigated costs if we do nothing and the mitigated costs from the actions. Emma will refine the plans and present to Schools Forum at the January meeting.

Dan Burns stressed that there is concern from academies due to the amount of strain and money being expected and Dan thanked Emma for her reassurance around the work being completed. Emma would like to work differently in terms of the models and focus on how the LA operate across the borough. She assured Schools Forum that this there will be a clearer come December.

The Vice Chair declared the basic need entitlement should be a priority and come first. She felt the split for the consultation was due to schools feeling there is a lack of transparency from the LA. For the meeting in January, the Vice Chair would like to have a better understanding of the position we are in, plus a report on Capital Projects including Special Schools. The Vice Chair assumed that if Schools Forum vote against the proposal, the LA would consult with the Secretary of State and the vote would be likely to be overturned.

Mungo Sheppard highlighted to Schools Forum that this time last year, there was very different response from head teacher as they felt there was a lack of clarity but feels this is currently not the case due to seeing how this money would be beneficial. His only reservation is the impact it will have on individual school budgets.

Jemima Flintoff felt it is important to recognise where head teachers feel concern as it is a large amount of money. If the LA are successful, we want to be transparent about our plans and be more frequently with any updates. The LA will be focusing on a review of the SEND bands and will be sharing timelines for the AP and ARP and Capital Projects around SEND to keep schools informed.

## **Vote on proposal to move 0.5 % to High Needs Block**

**Approve - 8**

**Oppose – 3**

**Schools Forum unanimously agree on the £2k estimate carry forward from Growth Fund is used to fund the 0.5% and the methodology on the basis the report is corrected and that basic entitlement comes first.**

A report is to be brought to the January meeting to focus on transparency and keep schools informed. Jane Davy will provide Schools Forum with the actual figures in January once they are known.

### **13. DSG Management Plan Report (Termly Review)**

The High Needs Deficit Reference group will be monitoring this monthly and an updated version of the report will be submitted for Schools Forum in January. The report will be in existence with Schools Forum.

### **14. De-Delegation of School Improvement Functions (Maintained Schools)**

Connie Beirne explained there is an effective School Improvement model providing successful outcomes with pupils and schools. Calderdale have 89.5% schools rated as outstanding which shows excellent relationships and working collaboratively. Survey feedback was positive and the self-assessments schools complete for their risk assessments shows a 75% engagement across all schools. Risk assessment is fluid throughout the school year meaning ongoing factors can affect the overall RAG rating. Risk assessments are revisited each year, focusing on children being placed in schools with EHCP and EAL. School clusters monitor this closely. Stakeholders and service providers assure best outcomes for children and engagement of Calderdale schools is at 95% plus. Calderdale have 2 maintained schools which are judged as “Requires Improvement” but Connie is confident during their next inspection this will improve. Connie directed Schools Forum to the 3 models outlined in the report and would like to continue with Model 1.

Mungo Sheppard agreed and commented on the effective system already in place, head teachers value this service and the current model. He feels some support for green RAG rated schools is essential and that the RAG rating system overall is not fit for purpose, especially around the attainment data and narrowing gaps.

Phil Hannah Q: What are the daily costs of the associated to provide support? £550 a day. The funding will not be increased and is expected to come from schools however, they receive this back by gaining a free service.

John Eccleston agreed with Mungo Sheppard. He has an interest in this item and agrees we need to keep implementing the model already in place. Rachel Harling and Gareth Morris also agree and commented the support is invaluable.

**Schools Forum maintained representatives unanimously agreed on Model 1.**

### **15. De-Delegation of Union Facilities Funding 2025-26**

Hamish Heald is asking Schools Forum to decide on the options put forward and if the central budget could be used to help reduce the deficit in part or in total. The decision will impact pupil rates going forward.

Vice Chair Q: What is the rationale with regards to the different rates for Primary and Secondary pupils?

The presumption is that it follows the NFF where secondary per pupil funding is more than primary schools. Hamish wants to focus on a phased increase of primary per pupil funding to moving closer to the secondary amount. The gap will become wider as times goes on by increasing per percentage. Other LA's have a flat rate for all their pupils.

Vice Chair Q: What is the evidence of the costs incurred in the primary and secondary sector to establish the differences per pupil?

The differential is based on the funding coming in and there is no data on the facilities time used. They (the unions) make themselves available to all schools who pay in to facilities time.

Vice Chair Q: Has the exercise started with those academies that do not buy in on establishing if they are compliant? I encourage the academy representatives of Schools Forum to check they are compliant to be more economical as I see the value of facilities time.

Yes, the exercise is a big focus this year. There is support from regional officers who are taking the lead on this. There are currently negotiations with TLT and we feel close to establishing a better understanding. We have met with Mick Kay at Impact Multi Academy Trust and had a conversation with Greater Heights Academy Trust. This was positive and they will be rejoining the scheme however they are not currently compliant and will require a level of facilities arrangements in current formats. This could be due to a lack of understanding the scheme.

Vice Chair Q: What is the logic for asking for the deficit to be funded from the central budget, the central budget must benefit all schools?

We are considering different ways to help schools without having to put up the per pupil charge to cover the deficit. It does benefit all schools and academies are invited to join and this was just a suggestion for Schools Forum to consider.

Vice Chair Q: Can information on income/expenditure per annum & carry forward deficits be provided?

I will send the Union Facilities I & E for 22-24 and 23 – 24 document to be distributed with the minutes.

Vice Chair Q: How can we vote on the secondary per pupil funding if there are no secondary school forum members at the meeting to represent?

Calder High and Todmorden High continue to be maintained schools. The Union representative thought that the Chair would have the casting vote if no secondary members were represented. The Legal Officer advised that the Chair could only vote if there had been a non majority vote. Moving forward, this could be a good reason to have a flat rate for all pupils so that the voting was by both primary and secondary jointly.

Rachel Harling Q: If academies join, could charges exceed costs and if so what would the actions be?

The surplus would be taken to next year, hopefully this can reduce that cost or keep as the same flat rate.

The Vice Chair asked for comments from Schools Forum on using the central budget to fund the deficit. She feels the central budget should not be used for union facilities due to it accumulating over the last few years. She highlighted that academies in the scheme will be underpaying and that is only fair that a methodology is adopted whereby the deficit is recuperated from them and maintained schools.

Gareth Morris has declared a previous interest in this item due to being a member of NEU. He highlighted that the amount was not set at the correct level in the past. Looking to the future he presumes there is a mechanism for setting budget.

Gareth Morris Q: Will the proposal ensure the money is correctly distributed in the future? Is the money being allocated going where it is needed? The money not being allocated correctly is leading to some unions being under resourced and some not using the overpayment.

Unions are currently having conversations with the LA around a new agreement for the facilities due to the current one being set in 2012. There will be a focus on the correct amount of facilities time being distributed. Unions have been asked to submit their membership numbers to Jane Davy. This will be discussed in the coming weeks and months leading to a recalculation which could affect the budget. If gaining more trust for the pooled arrangements is successful, there will be more facilities time available.

**Schools' Forum Primary representatives unanimously agreed to support the delegation for Primary Schools .**

**A report is to come back the meeting in January and representation from Secondary is needed as a priority to vote.**

## **16. Options Paper on Contingency Fund and Calderdale Headteachers Health and Wellbeing strategy 2025-2028**

Connie Beirne updated Schools Forum that there are 19 new head teacher this academic year. She would like there to be a focus on valuing and supporting existing head teachers and creating succession planning. The networks for primary and secondary school head teachers being run by 2 associates has been well met and the feedback has been positive. The Sowerby Bridge cluster want to conduct a Health and Wellbeing conference on 7<sup>th</sup> February 2025 for primary head teachers. The conference would cost £2520, CPHA agreed each cluster would fund £30 per head towards the conference. Connie is asking for a £5k contribution towards running the conference to support and maintain our existing head teachers and for CPHA and CASH to launch a strategy at their summer conferences which Connie would be involved in.

John Eccleston felt this should be supported due to the current pressures on head teachers and it would be positive for them to take advantage of this. Brenda Monteith will endorse this as she also understands the support needed for head teachers. Rachel Harling commented that head teacher are a valuable resource, we need to support them and it is a small amount to be able to do this.

**Schools Forum unanimously agreed to funding £5k towards the Calderdale Headteachers Health and Wellbeing conference to support the new strategy.**

**17. Scheme for Financing Schools (Maintained Schools)**

The data was updated during school holidays and has been published on the schools intranet for consultation. Jane Davy updated the insurance however, there are no actual changes to the scheme and no directed changed from the ESFA. Jane Davy will arrange this to be posted to the Schools Forum website for members to view.

**18. Any Other Business**

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

[CalderdaleSchoolsForum@calderdale.gov.uk](mailto: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.

**19. Future Dates**

16 January 2025

24 April 2025

3 July 2025

All meetings will start at 4pm

Venue: virtual Teams Meeting

# Report to Schools Forum

<b>Item</b>	7
<b>Meeting Date</b>	Thursday 16 January 2025
<b>Subject</b>	De-delegation of Funding 2025/26
<b>Report Author</b>	Hamish Heald/Jane Davy

## Report purpose

For Forum members to vote on whether funds for Union facilities time for maintained Secondary funds should be de-delegated in 2025/6 and to decide how best to set the per pupil charges for both primary and secondary sectors.

## 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 secondary schools in Calderdale should be de-delegated in 2025/26.
- b)** 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.
- c)** 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

Jane Davy, Finance Manager LMS Team [jane.davy@calderdale.gov.uk](mailto:jane.davy@calderdale.gov.uk)  
Hamish Heald, NEU Union Representative [hamish.heald@neu.org.uk](mailto:hamish.heald@neu.org.uk)

## **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). Based on October 24 PLASC data there are 42 maintained primary schools and 1 secondary School with a total of 9396 Pupils. 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 Sept 2025, 29 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, there will be a further 9,561 pupils which will generate further income for the union facilities time 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 have rejoined and we are hopeful that others, including Together Learning Trust, will follow. We are taking an increasingly harder line with academies who have stopped paying in to the arrangement and have changed our 'opt in' agreement to an 'opt out'. If academies wish to opt out, they must now demonstrate how they are fulfilling their legal responsibilities, which will help us to pressure them to pay in, as we know that many of them currently aren't.

- 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 primary and secondary maintained 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 **secondary schools** in Calderdale should be de-delegated in 2025/26.



- b) 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.
- c) 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 8,546 pupils in the Primary Sector and 850 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.

For a number of years there has been the repeated question about the existing discrepancy between primary and secondary per pupil charge. At the last Schools Forum meeting (14<sup>th</sup> November 2024) there was a strong indication of feeling that this historic practice should cease and that per pupil charges should be equalised across the two sectors. This will both remove the existing confusion over the arrangement and also streamline future voting procedures as only one vote will be needed for both primary and secondary pupils.

Also at this meeting, 3 different options were proposed for making the necessary increases by offering 2 different 'phased' approaches over the coming years as alternatives to a larger, one-off increase. There was an indication from Forum that the preference is for a one-off increase as this removes the uncertainty of the other options.

We are also 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 currently paying in. It benefits all schools in Calderdale as they are all given the option to pay in to pay into pooled facilities.

We ask you to vote for the following options in order to bring per pupil spending closer in line with other local authorities and create more sustainable FT arrangements for Calderdale schools and academies:

**Option 1: Equalisation between primary and secondary sectors with additional funds to be allocated from the Central Block DSG to cover the current deficit**

£4.19 per pupil (across both primary and secondary sectors)

**Option 2: Maintaining different charges for primary and secondary sectors, a 30% increase (+ inflation) for both sectors with additional funds to be allocated from the Central Block DSG to cover the current deficit**

25/26 - Primary Per Pupil Charge: £3.79

25/26 - Secondary Per Pupil Charge: £5.24

**Option 3: Equalisation between primary and secondary sectors with no funds to be allocated from the Central Block DSG to cover the current deficit**

£5.52 per pupil (across both primary and secondary sectors)

**Option 4: Maintaining different charges for primary and secondary sectors, a 30% increase (+ inflation) for both sectors with no funds to be allocated from the Central Block DSG to cover the current deficit**

25/26 - Primary Per Pupil Charge: £5.00

25/26 - Secondary Per Pupil Charge: £6.90

**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***

## **Appendix 2 Calculations**

Union Facility De-delegation			
Cost	£		
1. Union Officers	81,300		
2. Cost of administrating the fund	4,000		
3. Deficit	21,940		
4. Academy income to 31.8.24	-16,002		
Costs			
Option 2 & 4	91,238		
Option 1 & 3	69,298		
	actual		Differential
	Pupil		pupil
	numbers	ratio	numbers
Maintained school Primary Numbers	8,770	1.00	8,770
Maintained school secondary Numbers	1,353	1.38	1,867
7/12 ths Academy primary school numbers	3,231	1.00	3,231
7/12ths Academy secondary school numbers	3,183	1.38	4,394
Total	16,536		18,261
	per pupil		
Option 1	4.19		
Option 3	5.52		
	Primary	Secondary	
Option 2	3.79	5.24	
Option 4	5.00	6.90	

### Appendix 3

Summary of Income and expenditure for the past four years.

#### Union Facilities

20/21	20/21	21/22	22/23	23/24
Income	£	£	£	£
Maintained schools de-delegation	33,886.00	32989.00	35,707.00	39,056.00
Teachers pay grant	2,870.60	0.00	2,610.00	
Academy income	25,321.20	29518.87	26,982.57	28,193.00
additional DSG grant allocated		2986.27		
	<b>62,077.80</b>	<b>65494.14</b>	<b>65,299.57</b>	<b>67,249.00</b>
Expenditure	£	£	£	£
Salaries	54,459.20	65112.74	72,018.24	74,469.00
admin Charge	4,000.00	4000.00	4,000.00	4,000.00
	<b>58,459.20</b>	<b>69112.74</b>	<b>76,018.24</b>	<b>78,469.00</b>
Surplus brought forward		3618.60	0.00	-10,718.67
surplus/deficit to carry forward	<b>3,618.60</b>	0.00	<b>-10,718.67</b>	<b>-21,938.67</b>
Balance	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

# Report to Schools Forum

<b>Item</b>	8
<b>Meeting Date</b>	Thursday 16 January 2025
<b>Subject</b>	Early Years Funding Formulae and Centrally Retained Funds 2025/26
<b>Report Author</b>	Martyn Sharples, Senior Finance Officer

## Report purpose

- To consult Schools Forum on planned changes to Calderdale's Early Years Single Funding Formulae (EYSFF) for the early years entitlements.
- To inform Schools Forum of proposed hourly funding rates for 2025/26, paid to schools and early years providers for the early years entitlements.
- To seek Schools Forum approval of the amount and use of the centrally retained funds from the Early Years Block of DSG in 2025/26.

## Need for consideration

Schools Forum to give a view on the proposed changes to the Early Years Single Funding Formulae for the early years entitlements.

## Need for decision

Schools Forum to approve the amount and purpose of centrally retained funds.

## Contact Officers

Martyn Sharples, Senior Finance Officer –  
Children & Young People's Services Finance Team  
Tel. 01422 392719 or email: [martyn.sharples@calderdale.gov.uk](mailto:martyn.sharples@calderdale.gov.uk)

## 1. Background information and context

- a) The Government introduced the Early Years National Funding Formula (EYNFF) for the entitlements for 3 & 4 year-olds and confirmed the hourly funding rates from April 2017, for the entitlements for eligible 2, 3 & 4 year olds, the Early Years Pupil Premium (EYPP) and the lump-sum payment for the Disabled Access Fund (DAF). All of this funding is contained within the Early Years Block of the Dedicated School Grant (DSG). Alongside the EYNFF, the Government introduced Operational Guidance setting out the rules relating to how local authorities fund providers.
- b) Under the early years entitlements funding system, DfE distributes funding to local authorities who in turn distribute this funding to their providers using their own locally determined Early Years Single Funding Formulae (EYSFF). In Calderdale, the funded entitlements for eligible Under 2s and 2, 3 & 4 year-olds are delivered by Maintained Schools with nursery classes or Foundation units, nursery classes in Academies and Independent Schools, Children's Centres, Day Nurseries and Preschools, Out-of-School Clubs and Childminders. There are presently 205 providers delivering funded early education and childcare to eligible children (no change from last year). See the table in Appendix 1, showing the proportion of funded hours for each entitlement taken up in each type of provision.
- c) Local authorities must adhere to regulations and should follow the Early years entitlements: local authority funding operational guide to deliver the early years entitlements. This guidance is updated annually and can be found at [Early years entitlements: local authority funding operational guide 2025 to 2026 - GOV.UK](#)
- d) The final decision on the funding formulae, following any consultation, rests with the local authority. Funding rates, eligibility criteria and purpose of the EYPP and DAF are determined by central government.
- e) In April 2024, the Government commenced its planned expansion of the early years entitlement with the introduction of an entitlement of 15 hours over 38 weeks for eligible 2-year-olds with working parents. A further entitlement was introduced in September 2024 to provide for eligible children from the age of 9-months-old with working parents. Both new entitlements will be increased

from 15 hours per week to 30 hours per week over 38 weeks, from September 2025.

- f) To coincide with the expansion of the entitlements, changes were made to the Operational Guidance for 2024/25, including;
  - i. The introduction of a new National Funding Formula covering both the existing 2-year-old entitlement for disadvantaged children and new working parent entitlements for 2-year-olds and children aged 9 months to 2 years
  - ii. Extending the 95% pass-through requirement to the disadvantaged 2-year-old entitlement and the new working parent entitlements
  - iii. Extending local funding rules to the disadvantaged 2-year-old entitlement and the new working parent entitlement
  - iv. Confirming the requirement for local authorities to have special educational needs inclusion funds (SENIFs) for all children with special educational needs (SEN) eligible for or taking up the new and existing entitlements, regardless of the number of hours taken
  - v. Extending eligibility for EYPP and DAF to eligible children aged 2-years-old and under accessing the entitlements
- g) The Early Years Entitlement Local Authority Funding Operational Guide for 2025/26 was published on 10 December, 2024 and the main changes to the guidance are:
  - i. an increased minimum pass-through requirement for local authorities in 2025 to 2026 – the pass-through rate will increase from 95% to 96%
  - ii. an expectation that local authorities will announce their funding rates to childcare providers by 28 February 2025- it is intend to mandate this as a requirement in the regulations from the financial year 2026 to 2027
  - iii. changes to the special educational needs inclusion fund (SENIF) (section 6) and disability access fund (DAF) (section 8) sections of the guidance following a review of the department's

early years SEND funding arrangements, including an expanded section on expectations around SENIF arrangements, and greater detail on how DAF should be allocated and distributed.

- h) The Government increased early years funding by £510 million, compared with 2021/22 levels, over the three years up to 2025/26. This was for local authorities to increase the hourly rates paid to childcare providers for the government's free childcare entitlement offers and reflected cost pressures, as well as anticipated changes in the number of eligible children. Whilst the additional funding, provided by the Government so far, appears to have slowed the decline in the number of early years places. This does not reflect the registered places currently not available due to the shortage of qualified staff.
- i) The Authority consulted with schools with nursery classes and EY providers on 12 December, 2024 over the proposed changes to the EYSFFs, the option to receive monthly payments from April 2025 and the changes to the operational guidance. In addition, the Authority announced Provisional hourly funding rates to providers for the entitlements. The deadline for providers to submit responses was 5 January, 2025.
- j) The Authority received 9 responses ( from 3 childminders, 2 academies, 3 day nurseries and 1 preschool) to the Provider Funding Consultation Survey and they are summarised, as follows;
  - i. 100% agreed to introducing more flexible payment arrangements, whilst all the comments received stated that they would remain on termly payments but agreed with the option for monthly payments;
  - ii. 100% agreed to the changes to the Deprivation Supplement budgets, to better reflect the take-up of this supplement across the different entitlements;
  - iii. 89% agreed to establishing SENIF budgets for the new entitlements funded through the Early Years Block of DSG;
  - iv. 88% agreed to the change to the methodology for allocating the Central Support Services costs across the different

entitlements. A respondent commented on the need to ensure that funds are fully passed on to settings. The proposal ensures that the required 96% pass-through rate for each entitlement is being met;

- v. 88% agreed with the changes to Central Support staffing funded through the Centrally Retained Funds. 1 respondent disagreed but did not comment on the reason for their response; and
- vi. 75% agreed to retain Contingency budgets for the 2-year-old and Under 2s entitlements in 2025/26, set at 1% of the total amount of funding allocated to each entitlement, as it is too early to determine termly fluctuations in take-up. 2 respondents disagreed but did not comment on the reason for their response.

## **2. Main issues for Schools Forum**

- a) The proposed changes to Calderdale's EYSFFs are largely due to the roll-out of the new entitlements for 2-year-olds and Under 2s, the coincidental changes to Early Years funding regulations and the Authority's efforts to maximise the funding passed-through to providers to support them address the challenges of rising costs.
- b) Since April 2024, local authorities are required to have SENIFs for all children with SEN eligible for or taking up the entitlements, using funding from the Early Years Block and or High Needs Block of DSG. SENIFs should target children with lower level or emerging SEN, and children with an EHC plan continue to receive funding via the High Needs Block of DSG. The Authority passes all of their SENIFs through to providers in the form a top-up grant determined on a case-by-case basis. The Authority has sought to strike the right balance between the two blocks of funding, taking into account the particular pressures on the high needs and early years budgets locally.

- c) The expansion of early years entitlement, to include childcare for eligible 2-year-olds and under with working parents, is predicted to increase the total quantum of the Early Years Block of DSG in Calderdale to over £40million in 2026/27, compared with a final allocation of £14.6million in FY2023/24 and an indicative allocation of £24.1million in the current financial year. The Government have recognised that local authorities will require additional resources to carry out the central support activities for the new entitlements, but the proportion of overall funding local authorities will require to hold back for central spend will fall and the pass-through rate is expected to increase to 97% from 2026/27.
- d) The Early Years and Childcare Sufficiency Team (EY&CST) and Early Years Improvement Officers (EYIOs) are now fully funded through the Early Years Block of DSG and other grants. Due to the increased workload for the EY&CST in performing the headcount tasks and Early Years Census, administering various payments to providers and increased volume of enquiries regarding claimants' eligibility, there is a need for an additional 0.6FTE EY Sufficiency Officer at a cost of £32,500.
- e) The Children and Young People's Services Finance Team is funded through the centrally retained funds to provide the Service Manager - Early Years and Childcare Strategy and all early years providers with business advice and finance support. This support is currently provided through 75% of a Senior Finance Officer and a full-time dedicated Finance Officer – Early Years and Childcare. The growing demands on the Senior Finance Officer post to oversee the Early Years Block of DSG and support the Service Manager requires this post to become a full-time post specific to Early Years and Childcare. This will also assist in recruiting a replacement for the current Senior Finance Officer who is retiring in February 2025.
- f) The primary duty of the Finance Officer – Early Years and Childcare is to visit funded schools and private, voluntary and independent settings (including Day nurseries, Preschools, Independent Schools, Children's Centres and Childminders) to undertake audits and contract compliance checks. These are a varied and diverse range of organisations and enterprises, each with its own characteristics. There are approx. 200 funded organisations and



individuals and visits are currently scheduled on a 2-year cycle to all schools and settings and all childminders receiving above £10,000 per year. There is a need to increase the sample size of children audited to include children accessing the new entitlements and ensure robust financial management across all entitlements. Also, with the increase in amounts paid to providers, many increasing to in excess of £250,000 pa and up to £500,000 pa, the frequency of some visits needs increasing to manage risks for both the Authority and providers. We can expect more childminders to require visits with higher funding rates for the 2-year-olds and under 2s. These visits are essential to ensuring that we are complying with legislation and statutory guidance and ensuring providers are not breaching the guidance or mis-administrating public funds.

To undertake the expanded audit and compliance visits and on a more frequent basis for some providers, we require an additional Finance Officer – Early Years and Childcare to have the capacity to undertake this work.

The total cost of Finance Services for 2025/26 will be £168,000.

- g) In recent years, Calderdale have met the needs of their pupils with SEND, including SENIF and specialist inclusion services for children in early years, within their High Needs Block of DSG. However, it has become significantly difficult to meet increasing local need within the grant allocated by the DfE.

The growth in the overall quantum for the Early Years Block of DSG will allow for the costs of 2.68 FTE EY Specialist Inclusion Officers and an EY Outreach Worker to be met from the Early Years Block, within the expected pass-through regulations. This transfer of costs to the Early Years Block will assist in the reduction of the High Needs Block overspend and secure the support provided centrally.

The cost of Specialist Inclusion Officers and an EY Outreach Worker will be £221,000 in 2025/26.

- h) Other central support costs funded through the centrally retained Early years DSG includes; the cost of the Service Manager Early Years and Childcare Strategy post; ICT infrastructure, licences and support; and Team resources and advertising. In 2025/26, these costs remain similar as in 2024/25.
- i) The estimated total for the Centrally Retained Funds in 2025/26 is £1.067million, representing between 2.87% & 3.69% across each funding stream in 2025/26 and between 1.55% & 2.63% in 2026/27. Further details can be found in the table at 3 b)(iv) on page 12 of this report.

### **3. Recommendations**

- a) Schools Forum to note the following;
  - i. the continued financial pressures on schools and EY providers delivering the funded entitlements to early years and childcare due to the rise in costs not being met through increases in government funding;
  - ii. the increasing risk of the Authority being unable to maintain sufficient early years education and childcare places to meet its statutory duties;
  - iii. the challenge facing the Authority in striking the right balance in setting budgets for the SENIFs, drawing funds from the Early Years and High Needs blocks of funding, taking into account the particular pressures on high needs and early years budgets locally and the 96% pass-through requirement.
  - iv. the additional capacity required within Central Support Services to manage the complex changes to regulation and guidance and to administrate increased payments to providers, due to the expansion of the entitlement and growth in the quantum of the Early Years Block of DSG.
- b) Schools Forum to approve the following;
  - i. request for additional post in the EY&C Sufficiency Team to manage the increased workload due to the expansion of the entitlements.

- ii. request to fund Finance Services to recruit additional and replacement staff to respond to the increased workload due to the expansion of the entitlements and increased levels of funding.
- iii. funding early years posts within the Specialist Inclusion Team, specified in the report, from the EY Centrally Retained Funds.
- iv. To centrally retain £1.07 million (between 2.9% and 3.7% across the entitlements) of the total quantum of funding for the early years entitlements (excluding EYPP and DAF). The following table shows a breakdown of the Centrally Retained Funding for 2025/26 compared with 2024/25.

EY DSG Centrally Retained Funding	Budget 2024/25	Budget 2025/26	Comments
IT Systems, Licences & Support	£45,000	£45,000	
Management	£105,420	£104,770	1.0FTE Service Manager
Early Years Improvement	£149,860	£159,622	2.9FTE EYI Officers
Early Years & Childcare Sufficiency	£214,811	£267,913	3.6FTE Officers up from 2.6FTE Officers 1.0FTE Business Support Officer Expenses & Marketing Costs
Business Support / Finance	£108,302	£167,697	1.0FTE Senior Officer up from 0.75FTE 2.0FTE Finance Officers up from 1.0FTE.
EY SEND Support		£220,680	Additional 2.68FTE EY SEND Officers and 1.0FTE Outreach Worker
Total Planned Central Spend	£623,392	£965,682	
Total Planned Central Spend as % of funding for entitlements	2.62%	2.87%	

Planned transfers between entitlements	£228,628	£101,669	
Total Centrally Retained Funding	£852,020	£1,067,351	
Total Planned Central Spend as % of funding for entitlements	3.58%	3.18%	

#### **4. Reasons for recommendations**

- a) The Government expects local authorities to fund central support services for Early Years and Childcare from the EY Block of DSG and this is reflected in the Finance Regulations. The amount determined for 2025/26 reflects a change in the structure of the Early Years and Childcare Sufficiency Team; securing existing Early Years SEN capacity at risk due to budget pressure in the High Needs Block; and additional support from Finance Services.
- b) As a result of the way that regulations are applied to each entitlement, it is sometimes necessary to transfer funds between entitlements. Funds must be centrally retained to be allowed to transfer between entitlements and are not counted within the pass-through rate even though they will be distributed to schools and early years providers.

#### **5. Impact of funding, targets, and milestones**

Contained within this report

## 6. Resource implications

### Indicative Funding Allocation 2025/26

Description	Under 2-year-old entitlement	2-year-old receiving additional support entitlement	2-year-old working parents entitlement	3-& 4-year-old entitlements
Base Rate	£ 9,404,853	£ 2,297,277	£ 6,331,432	£13,383,652
Deprivation Supplement	£ 36,371	£ 177,003	£ 33,392	£ 371,686
SENIF	£ 150,000		£ 150,000	
Contingency	£ 100,628	£ 25,740	£ 67,982	
Central Spend	£ 370,901	£ 73,984	£ 215,399	£ 407,067
<b>Total Expenditure</b>	£10,062,752	£ 2,574,004	£ 6,798,205	£14,162,405
<b>Provisional Indicative EY DSG Allocation – Dec 2023</b>	£10,062,753	£ 2,574,004	£ 6,798,205	£14,162,405

## 7. Appendices

Appendix 1 – Table showing the proportion of funded hours for each entitlement taken up in each type of provision

Appendix 2 – EYSFF for 3-& 4-year-olds universal and extended entitlements

Appendix 3 – EYSFF for 2-year-olds receiving additional support

Appendix 4 – EYSFF for 2-year-olds with working parents

Appendix 5 – EYSFF for 9-month to 2-year-olds with working parents

**Appendix 1 – Table showing the proportion of funded hours for each entitlement taken up in each type of provision**

	2 year old With additional support entitlement	2 year old With working parents entitlement	Universal 3 & 4 year old entitlement	Extended 3 & 4 year old entitlement
	% of funded hours for Summer 2024			
Children's Centre	28.3	6.4	7.1	4.0
Childminder	6.0	11.8	3.8	7.0
Day Nursery	40.4	67.1	33.8	47.8
Maintained Nursery Class	5.5	1.9	23.6	17.0
Nursery Unit of Academy	1.3	1.1	14.0	10.2
Nursery Unit of Independent School	0.2	2.8	3.6	1.0
Out of School Club	0.0	0.1	0.0	0.2
Preschool	18.4	8.8	14.1	12.8

## Appendix 2 – EYSFF for 3- & 4-year-olds universal and extended entitlements

EYSFF for the 3- & 4-year-olds entitlements for 2025/26

Description	Hourly Rate / Annual Budget	% of Total EY Funding for 3- & 4-year-old entitlements
Hourly Rate paid to Calderdale	£5.71 ph	100.00
Universal Base Rate	£5.46 ph	95.62
Deprivation Supplement	£0.78 ph	2.62
SEN Inclusion Fund	£500,000 pa	3.53
Contingency	£0 pa	0.00
Pass Through Rate		101.75
Centrally Retained Fund	£407,067 pa	2.87%

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass Through Rate, however, the budget for this is not currently funded through EY Funding and this explains why the Pass Through Rate exceeds the total EY Funding. In 2025/26, the minimum pass-through rate has increase to 96% from 95%. In Calderdale, we plan to exceed this requirement passing through over 98% and over 101% including SENIF. The remaining shortfall in funding is met from underspends from previous years.

## Appendix 3 – EYSFF for 2-year-olds receiving additional support

EYSFF for 2-year-olds receiving additional support entitlement

Description	Hourly Rate / Annual Budget	% of Total EY Funding for 3- & 4-year-old entitlements
Hourly Rate paid to Calderdale	£7.94ph	100.00
Universal Base Rate	£7.40ph	93.20
Deprivation Supplement	£0.78 ph	6.88
SEN Inclusion Fund	£150,000 pa	5.83
Contingency	£22,629 pa	1.00
Pass Through Rate		106.91
Centrally Retained Fund	£73,984 pa	2.87%

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass Through Rate, however, the budget for this is not currently funded through EY Funding and this explains why the Pass Through Rate exceeds the total EY Funding. In 2025/26, the minimum pass-through rate has increase to 96% from 95%. In Calderdale, we plan to exceed this

requirement passing through over 101% and over 106% including SENIF. The remaining shortfall in funding is met through transferring funds from other entitlements.

#### **Appendix 4 – EYFSS for 2-year-olds with working parents**

EYSFF for 2-year-olds with working parents entitlement

<b>Description</b>	<b>Hourly Rate / Annual Budget</b>	<b>% of Total EY Funding for 2-year-old with working parents entitlements</b>
Hourly Rate paid to Calderdale	£7.94 ph	100.00
Universal Base Rate	£7.40 ph	93.20
Deprivation Supplement	£0.78 ph	0.49
SEN Inclusion Fund	£150,000 pa	2.21
Contingency	£22,629 pa	1.00
Pass Through Rate		96.90
Centrally Retained Fund	£215,399 pa	3.17%

#### **Appendix 5 – EYSFF for 9-month to 2-year-olds with working parents**

EYSFF for 9-month to 2-year-olds with working parents entitlement

<b>Description</b>	<b>Hourly Rate / Annual Budget</b>	<b>% of Total EY Funding for Under 2-year-old with working parents entitlement</b>
Hourly Rate paid to Calderdale	£10.79 ph	100.00
Universal Base Rate	£10.15 ph	94.07
Deprivation Supplement	£0.78 ph	0.36
SEN Inclusion Fund	£150,000 pa	1.49
Contingency	£100,628 pa	1.00
Pass Through Rate		96.92
Centrally Retained Fund	£370,901 pa	3.69%



# Report to Schools Forum

<b>Item</b>	9
<b>Meeting Date</b>	16 January 2025
<b>Subject</b>	Calderdale CSSB-funded statutory services for schools / Allocation of 2025/26 Central School Services Block (CSSB)
<b>Report Author</b>	Steve Drake

## Report purpose

- To provide an update on the Calderdale CSSB-funded statutory services for all schools
- To seek approval of the members of Schools Forum on the proposed use of the 2025/26 Central Services Block funding

## Need for consideration

Schools Forum is asked to note the continuing reduced CSSB funding envelope in 2025/26

## Need for decision

Schools Forum is asked to approve the recommended allocation of the 2025/26 Central School Services Budget (CSSB) as set out in the report.

## Contact Officers

Steve Drake, Finance Manager [Steve.drake@calderdale.gov.uk](mailto:Steve.drake@calderdale.gov.uk)

## 1. Background information and context

- a) In April 2018 the DfE created the central school services block (CSSB) through which LAs are allocated funding for the statutory responsibilities they hold for all schools.
- b) The CSSB brings together:
- funding previously allocated through the retained duties element of the ESG
  - funding for ongoing central functions, such as admissions, previously top-sliced from the schools block and now determined by the National Funding Formula using a pupil-led formula.
  - residual funding for historic commitments, such as School Improvement Cluster funding, previously top-sliced from the schools block
- c) Schools Forum is reminded that the DfE is reducing the historical commitments element of funding over time regardless of whether local authorities have ended these arrangements. The DfE has confirmed that funding for 2025/26 will reduce by a further £31K. Any under or overspends from 2024/25 will be carried forward to increase or reduce the funding available in 2025/26.

	2024/25 allocation  £,000	2025/26 proposal  £,000
Government mandated	229	240
Retained duties	320	248
Statutory / Regulatory services to schools	1,261	1,291
Total	1,810	1,779

- d) LA's are required to advise their School Forums on the proposed use of CSSB funding and an operational guide has been published setting out restrictions on how the funding can be spent, this can be found in Appendix 3 of this report.
- e) The following central services are allocated funding from the CSSB to meet the LA's statutory duties for all schools:
- Education Welfare
  - Exclusions
  - HR Pensions
  - LFM Finance
  - SCARE
  - School Organisation and Planning
  - Strategic Planning for Education

## 2. Main issues for Schools Forum

- a) The CSSB funding for 2025/26 will be **£1.779m** based on the following:

Funding for historical element	£0.451m
Funding for ongoing responsibilities under the NFF	£1.327m
<b>Total</b>	<b>£1.779m</b>

Any underspend of the 2024/25 allocation will be rolled forward and this funding can be utilised in 2025/26 to address budget pressures or fund additional projects within the CSSB

The historical element has been reduced by 20% (£113K) compared to 2024/25.

The per-pupil rate for ongoing responsibilities has been confirmed as £41.93 for 2025/26. This is a 8.486% increase on the 2024/25 per-pupil rate of funding. The funding is based on pupil data as at Oct 2024 (ie 31,657).

- b) 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 allocated appropriately. 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.
- c) **Appendix 1** lists the proposed use of the Central School Services Block (CSSB) for 2025/26.
- d) **Appendix 2** Lists the services and estimated costs of meeting LA statutory duties in 2025/26.
- e) **Appendix 3** provides extracts from guidance.

#### Note

- I. The first call on the funding must be for School Licences to cover the cost for copying of materials, performing, recording and broadcasting of music and films in schools. It has been forecast this will be £240k in 2025/26. This is Government mandated.
- II. Funding of £248k has been allocated to School Improvement Cluster Funding in 2025/26. This has had to be reduced following the reduction in historic funding.
- III. The 2025/26 CSSB funding required, as shown in Appendix 1 is £1.779m with £1.779m available, the funding has been allocated in full
- IV. Through its business planning processes the LA will continue to scrutinise and actively challenge its operating models to ensure effective and efficient delivery of its services to reflect statutory requirements.

### 3. Recommendations

- a) Schools Forum is asked to approve the recommended allocation of the 2025/26 Central Schools Services Block (CSSB) as set out in the report.

- b) Through its business planning processes the LA will continue to scrutinise and actively challenge its operating models to ensure effective and efficient delivery of its services to reflect statutory requirements.

**4. Reasons for recommendations**

Contained in this report

**5. Impact of funding, targets, and milestones**

Contained in this report

**6. Resource implications**

Contained in this report

**7. Appendices**

Appendix 1: Proposed Allocation of Central School Services Block 2025/26.

Appendix 2: Calderdale Council's CSSB-Statutory/Regulatory Services to Schools.

Appendix 3: Extract from Guidance

## APPENDIX 1

### Proposed Allocation of Central School Services Block 2024/25

Service Area	2024/25 Funding Allocation £000's	
<b>Government Mandated</b>		<b>240</b>
School Licences	240	
<b>Retained Duties</b>		<b>248</b>
School Improvement Cluster Funding	248	
<b>Statutory/Regulatory Services to Schools</b>		<b>1,291</b>
Including:		
Education Welfare	344,405	
Permanent Exclusions	60,916	
Centrally Controlled Teachers' Pensions	120,000	
Finance Support/ LFM	52,250	
SACRE	20,286	
Capital Advice & Projects	95,000	
Strategic Planning of School Places/ School Admissions/ School Organisation/ Schools Forum Support	460,640 5,000	
Strategic Planning	132,920	
<b>CSSB Funding required</b>		<b>1,779</b>

<b>CSSB Funding available</b>	<b>1,779</b>
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<b>Balance to allocate</b>	<b>0</b>
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## **APPENDIX 2**

### **Statutory/Regulatory Services to Schools**

#### **1. Education Welfare Service (EWS)**

**2025/26 cost of meeting EWS duties £344,405**

**2025/26 cost of meeting Exclusions duties £60,916**

The service structure identified to meet the responsibilities requires the following:

- Team Manager
- EHE Lead Officer
- EHE Officer
- EWO x 4
- 1.6 FtE Business Support

#### **2. HR Pensions**

**2025/26 cost of centrally controlled teachers' pensions        £ 120,000**

Additional pension funding that LAs have claimed for centrally employed teachers has now been rolled into the ongoing responsibilities element of the CSSB.

#### **3. LFM Service**

**2025/26 cost of meeting LFM duties:                                £ 52,250**

#### **Statutory duties**

The Local Authority has the following statutory duties under the Schools and Early Years Finance Regulations 2018, School Standards and Framework Act 1988, Education Act 2002:

#### **Responsibilities for all schools**

- Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)
- Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c)
- Calculation and audit of individual school budget shares to all schools
- Payment of High Needs top up to all schools.

## **Customer need**

- Sound financial advice and planning.
- Financial skills and school/academy experience
- Choice
- Value for Money
- High quality, customer focused service meeting individual customer needs
- Consistency and stability
- Personable/relationships
- Someone to listen to enquiries, feedback, complaints and act promptly

### **Changes to delivery:**

For all schools the Service calculates ISB (individual school budgets) and pays high needs top up. For maintained schools the Service currently pays all other ESFA grants. There is no alternative to the LA carrying out these duties. During the Covid-19 pandemic, the service was delivered remotely, and no face-to-face support or school visits were undertaken. It is envisaged this will continue in the future for the majority, apart from a small number, of cases. The saving in reduced travel costs is being used to part-fund a trainee Finance Officer as a resilience measure as the service has several staff nearing retirement age.

## **Outcomes**

- The LA has discharged its statutory LMS duties and schools have been paid.
- All academies receive a statement from the ESFA in March based on the information provided from the LA detailing their ISBS for the year starting 1 September.
- Financial guidelines are prepared to ensure schools meet their statutory duty when spending public money.
- Reports prepared to assist Schools Forum to carry out their statutory duties in accordance with school regulations.
- School expenditure monitored against budget to ensure schools do not fall into deficit and advice and early intervention is provided to minimise cost to the school and LA.
- Timely payment of High Needs top ups to all schools ensures schools have funding for resources to help pupils with additional educational needs.
- Liaising with external audit on schools' behalf to minimise external interventions.

## **4. SACRE**

**2025/26 cost of meeting SACRE duties: £ 20,286**

### **Statutory duty for all schools:**

Standing Advisory Council for Religious Education (SACRE) (Sch 2, 17)



SACRE is commissioned to an external provider with the LA providing clerking and administrative support.

## **5. School Organisation and Access**

**2025/26 cost of Capital advice and projects: £ 95,000**

The Capital advice & projects budget is to pay for the cost of the schools area of the Corporate Projects & Capital team

**2025/26 cost of meeting Admissions duties: £ 460,640**

The admissions budget pays for the team managed by the Senior Commissioning Officer (School Organisation & Planning) & includes 2 Senior Admissions Officers & 2 Admissions Officers who provide the statutory service.

In addition 3 posts were approved at schools forum in January 2023 who are being funded from this budget. A Fair access officer, an asset management / PFI officer & a school organisation & asset officer. These posts support all schools including academies

**2025/26 cost of Schools Forum Support: £ 5,000**

### **Capital advice and projects.**

#### **Schools Capital**

Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)

The Service plays a key role developing schools capital spending plans: for maintenance funding (as part of an approval process – panel led); basic need (sufficiency of provision) to identify and agree where spend is invested and act as 'client' in the commissioning of such additional provision. The Local Plan is now in place which has generated an increased workload to be followed by project delivery.

#### **Sufficiency and Planning**

- Obtain birth data, GP registrations and Town Planning data to map to school planning areas to project demand for future school places and work with officers on the Local Plan to ensure educational requirements are represented in proposals.

#### **School Organisation**

- Identify and develop school organisational proposals and manage through statutory and decision-making processes and implementation.

- Annual SCAP Return advises DFE on pupil capacity against projected need for places and influences funding to create additional places.

### **Meeting Admissions duties.**

#### **Co-ordination of admissions**

- Primary, Secondary, Published Admission Numbers and Oversubscription Criteria (for all Community and VC Schools)
- Challenge unfair arrangements or breaches of code through the Schools Adjudicator
- Collate admission arrangements and publish prospectus
- Admissions Forum (no longer statutory): a consultative group providing admissions advice and guidance to LA officers
- Advice and guidance to schools and parents on admission processes
- Attend school open evenings
- Manage application process for all places including the co-ordination of cross border requests. Manage the application process for reallocation requests for all schools
- Manage coordinated round of reallocations to published criteria
- DFE statistical returns and Annual Report to the Office of the Schools Adjudicator

#### **In Year Applications:** allocation of places (part statutory)

- Receive, vet and prepare applications for BACS
- Manage in-year transfer requests through attending and/or chairing BACS
- Implement In-Year Fair Access protocols for hard to place pupils (Statutory).
- Directed Pupils (Statutory)

#### **Appeals**

- Prepare and present defence for schools at Independent Appeal / Arbitration

**Alternative approach:** Although some elements of in-year process exceed the required statutory minimum, they enhance the LA's ability to discharge those duties.

Most work is carried out in a prescribed manner to a set timetable so the scope for changing or developing the service is to a degree constrained by the legal and regulatory framework.

### **Schools Forum**

- Support and coordinate the work of the Schools Forum (Sch 2, 12)

## **6. Strategic planning**

**2025/26 cost of meeting Strategic planning duties:    £ 132,920**

### **Statutory duties**

The LA's Strategic duties in planning for Calderdale's education service are defined under Children Act 2004 Section 18, Education Act 2005 Sections 11B and 11A, Section 15 (amended by Education Act 2011 section 40), Education and Inspections Act 2006 Sections 60A and 69B. They include:

**For all schools:**

- Director of Children's Services and personal staff for Director (Sch 2, 15a)
- Planning for the education service as a whole (Sch 2, 15b)
- Consultation costs relating to non-staffing issues (Sch 2, 19)
- Plans involving collaboration with LA services or public/voluntary bodies (Sch 2, 15f)
- Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)

## **APPENDIX 3**

Extract from Guidance

### **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.

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 forum.

The department has included references to the relevant schedules in the [School and Early Years Finance \(England\) Regulations 2022](#).

### **51. Responsibilities held for all schools**

Statutory and regulatory duties

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

#### **51.1 Education welfare**

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

## **51.2 Asset management**

- management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Schedule 2, 14a)
- general landlord duties for all buildings owned by the local authority, including those leased to academies (Schedule 2, 14b)

## **51.3 Other ongoing duties**

- licences negotiated centrally by the Secretary of State for all publicly funded schools (Schedule 2, 8); this does not require schools forum approval
- admissions (Schedule 2, 9)
- places in independent schools for non-SEN pupils (Schedule 2, 10)
- remission of boarding fees at maintained schools and academies (Schedule 2, 11)
- servicing of schools forums (Schedule 2, 12)
- back-pay for equal pay claims (Schedule 2, 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, 23)

## **51.4 Historic commitments**

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

## **52. Responsibilities held for maintained schools only**

### **52.1 School improvement**

- expenditure related to core school improvement activities of local authorities with respect to maintained schools (Schedule 2, 54)

### **52.2 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, 59)
- budgeting and accounting functions relating to maintained schools (Schedule 2, 75)
- authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Schedule 2, 60)  
Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Schedule 2, 61)
- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Schedule 2, 62)
- functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Schedule 2, 63)

- 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, 64)
  - 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, 65)
  - retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Schedule 2, 78)
  - HR duties, including advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Schedule 2, 67), determination of conditions of service for non-teaching staff (Schedule 2, 67); appointment or dismissal of employee functions (Schedule 2, 68)
  - consultation costs relating to staffing (Schedule 2, 69)
  - compliance with duties under Health and Safety at Work Act (Schedule 2, 70)
  - provision of information to or at the request of the Crown relating to schools (Schedule 2, 71)
  - school companies (Schedule 2, 72)
  - functions under the Equality Act 2010 (Schedule 2, 73)
  - establish and maintaining computer systems, including data storage (Schedule 2, 74)
  - appointment of governors and payment of governor expenses (Schedule 2, 75)
- 52.3 Education welfare**
- inspection of attendance registers (Schedule 2, 81)

#### **52.4 Asset management**

- general landlord duties for all maintained schools (Schedule 2, 79a & b (section 542(2)) Education Act 1996; School Premises 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)

#### **52.5 Central support services**

- clothing grants (Schedule 2, 55)
- provision of tuition in music, or on other music-related activities (Schedule 2, 56)
- visual, creative, and performing arts (Schedule 2, 57)
- outdoor education centres (but not centres mainly for the provision of organised games, swimming, or athletics) (Schedule 2, 58)

## **52.6 Premature retirement and redundancy**

- dismissal or premature retirement when costs cannot be charged to maintained schools (Schedule 2, 80)

## **52.7 Monitoring national curriculum assessment**

- monitoring of National Curriculum assessments (Schedule 2, 77)

## **52.8 Therapies**

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

## **52.9 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 1998 Act (financing of maintained schools), the administration of grants to the local authority (including preparation of applications) and, where it's 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

# Report to Schools Forum

<b>Item</b>	10
<b>Meeting Date</b>	Thursday 16 January 2025
<b>Subject</b>	High Needs Block Deficit Recovery Plan
<b>Report Author</b>	Emma Ingham, SEND & Inclusion Service Lead

## 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

For information only

## Need for decision

None required

## Contact Officers

Jemima Flintoff, Assistant Director for Education and Inclusion

[jemima.flintoff@calderdale.gov.uk](mailto:jemima.flintoff@calderdale.gov.uk)

Emma Ingham, SEND and Inclusion Service Manager [emma.ingham@calderdale.gov.uk](mailto:emma.ingham@calderdale.gov.uk)



## **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 officers have been working with the DfE as a partner within the national Change Programme.
- c) Calderdale has been one of the few LA's who have met the needs of their pupils with SEND within their DSG High Needs Block. However, due to unprecedented pressure this position has significantly changed within the last two financial years
- d) 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. This management plan has been in place since the secretary of state agreed the 0.5% schools block transfer in February 2024

## **2. Main issues for Schools Forum**

### **January 2025 update – response to questions raised in September 2024 schools forum**

#### **a) Financial Forecast 2024/25 & 2025/26**

At time of writing the overspend in high needs for 24/25 is forecast to be in excess of £13.5M. Due to the delayed announcement of 25/26 funding allocations, a forecast for 25/26 is not included in this report. However, a special School Forum meeting scheduled for 24<sup>th</sup> February 2025 will include a more detailed forecast within the high needs report.

**b) Actions to date**

The High Needs Budget Deficit Reference Group (HNBDRG) have met monthly since September 2024 to focus on areas of the recovery plan and scrutinise how the Local Authority plans to address overspends within the High Needs Block.

Areas of focus in the Autumn term have included:

- Specialist independent places
- Specialist Inclusion Team

Terms of reference for this group can be found in the appendix

The LA will have their next meeting with the ESFA in March 2025 to discuss progress and the LA will report back to Schools Forum the outcomes from this meeting in April 2025.

**c) How is Basic Needs Funding and High Needs Capital Fund supporting the High Needs deficit Recovery Plan?**

Basic Needs Funding is allocated to all local authorities by the DFE to enable LAs to meet their statutory obligations to ensure there are sufficient and suitable places for their pupils. Basic Need Funding covers both mainstream and special provision but must result in the creation of additional places that can be recorded as available capacity on the SCAP return submitted to the Department For Education each year. High Needs Capital Funding is similarly targeted at the creation of additional capacity.

The Council has committed £27m capital funding for SEND to address the changing demographic of needs in the local area, which is resulting in more children needing access specialist school places or inclusive learning spaces in mainstream settings. Two key schemes make up the bulk of that commitment, the planned Free School application for a new special school at Threeways site in North Halifax, which is estimated at a cost of £20m (pre-tender estimate) and investment into the Ravenscliffe School site at Spring Hall (estimated at £3m). A variety of smaller projects in mainstream schools, including the development of additional resource-based provisions (ARPs)

and the development of Tier 1 and Tier 2 alternative provision are underway to enable children to remain in mainstream wherever possible through smaller, more supported learning environments; these take up the remainder of the £27m capital funding balance.

**d) Feedback of the 0.5% block transfer 24/25**

As part of the condition to approve the 24/25 the Local Authority have itemised the spend for the block transfer request for 2024 to 2025, explaining how this will improve outcomes and/or develop longer term high needs sustainability. 100% of the block transfer will be passported directly back to schools via the ever-expanding resource provision strategy or via exceptional funding requests supporting cohorts of SEND children and young people in mainstream settings

The following table summarises this spend:

Total transferred **£962,674**

Project	Number of settings receiving additional funding from block transfer	Impact	Expenditure
Resource provisions	2	20 Additional specialist places in mainstream resource provisions	£216,344
Exceptional Funding requests	10 to date 2 panels remaining	Increased capacity for mainstream settings to effectively support SEND children and young people remaining in mainstream provision.  Estimate an average of 8 students per setting supported directly and additional specialist staff indirectly benefitting the wider mainstream population	£610,391  £135,939 available for remaining panel requests

### **3. Appendix**

## **Calderdale Children and Young People's Dedicated Schools Grant (DSG) High Needs Block (HNB) Reference Group**

### **Terms of Reference**

#### **Purpose**

The purpose of the Calderdale Children and Young People's Dedicated Schools Grant (DSG) HNB Recovery Group is to promote the effective expenditure of funds from the DSG in securing good outcomes for Children and Young People in Calderdale and inclusive practice in settings by overseeing the development of the Deficit Recovery Plan and scrutinising its implementation.

#### **Scope of the Group**

The Group comprises of representatives from:

- Calderdale Council
- Schools Forum/Governance Representative
- Primary Schools
- Secondary Schools
- Special Schools
- The Post-16 Sector
- Voice Calderdale
- Health

It is recognised that in their constitution each of these individual organisations and groups of organisations represented is broadly independent of the other. However, all are key stakeholders in the collective provision for Children and Young People resident in Calderdale and all will strive to meet the purpose and aims of the DSG Reference Group both as contributors and as representatives of their sectors.

#### **Aims of the Group**

The Group will:

- Understand trends in expenditure; actual expenditure; and planned expenditure from the DSG on Children and Young People resident in Calderdale.
- Understand the provision currently available and the provision required to enable deficit recovery.
- Understand the needs within Calderdale.
- Understand the budget resources available to meet the needs.

- ensure that the Deficit Recovery Plan is and remains fit for purpose.
- scrutinise and evaluate the implementation of the Deficit Recovery Plan, through
  - receiving reports from those responsible for the plan and other plans that feed into it.
  - commissioning focused studies on aspects of the plan
  - reviewing the progress of the actions and impact of the plan against agreed SMART indicators.
  - mapping the impact of actions against expenditure
- propose amended actions in the Plan, as needed.
- ensure that stakeholders in the sectors represented on the Group are kept informed of the Group's work.
- seek the views of stakeholders to inform the Group's work.
- through its members, seek to influence stakeholders to take action that will maximise value for money in expenditure on Children and Young People resident in Calderdale.

## **Working Principles**

To achieve these aims, members of the Group will:

- put the interests of Children and Young People first.
- work within the constraints of legislation and guidance that applies to provision for Children and Young People, specifically but not exclusively with regards to funding.
- work to maximise the positive impact of the expenditure of substantial sums of public money on the outcomes achieved by Children and Young People resident in Calderdale.
- work to identify efficiencies in the expenditure of funds on Children and Young People and achieve reductions in expenditure where possible.
- be prepared to challenge each other and others in the spirit of seeking the best outcomes for Children and Young People and maximising the impact of expenditure on them.
- form judgements and make decisions based on the best available information and data
- be open to learning from good practice elsewhere.
- communicate the work of the Group openly to other stakeholders and seek feedback on it.
- seek to work by consensus where possible; and on the basis of a majority vote when required.

## **What the Group will do**

In its meetings, the Group will work as described in these Terms of Reference.

It is recognised that the Group does not have legal powers in its own right, but it derives authority from having been set up at the behest of the DfE and with the full support of the Schools Forum as a key element in the process of controlling expenditure from DSG funds on provision for Children and Young People with Special Educational Needs resident in Calderdale. The Group will therefore provide regular accounts of its work to the DfE, Calderdale SEND Partnership Board, Schools Forum, and the other stakeholder groups of which the representatives are members.

## **Governance and accountability**

The work of the Group will report to Calderdale SEND Partnership Board and Schools Forum. The “DSG Recovery Deficit Plan” will be a standing item on the agenda for all Schools Forum meetings.

There will be several workstreams / Task & Finish Groups that will report into the Group. These will be listed in the DSG Recovery Plan and contribute to reports to the Schools Forum.

Updates on the work of the Group will be provided to the Calderdale SEND Partnership Board.

The meetings will be held in private.

## **Meetings**

The Group will meet a minimum half-termly. The agenda and supporting papers will normally be circulated 5 working days ahead of the meeting. Draft minutes and action points will normally be circulated within 5 days following a meeting.

## **Membership**

Victoria Coyle	Interim Head of SEND
Emma Ingham	Inclusion & SEND Service Manager
Leah Webster (Chair)	Family Voice Calderdale
Steve Drake	Finance Manager (CYP)
Jane Davy	Finance Manager (CYP)
Karen Morley	Academy Representative Schools Forum
Jenna Port	Special School Representative Schools Forum
Jo Bastian	Primary School Representative Schools Forum
Sharon Harwood	Primary School Representative
Nikki Wood	Service Manager Early Years & Childcare Strategy
Carly Hartshorn	Commissioning Manager NHS
Karl Veltman	Post 16 Representative Schools Forum
Kirsty Kaye	Team Manager Childrens Social Care
Phil Hannah	AP Academy Representative Schools Forum
Charlie Johnson	Secondary Academy Representative

## **Review of Terms of Reference**

These Terms of Reference will be reviewed at least once every 12 months, or at a time when the Board is otherwise reviewing its activity.

## **Confidentiality and Data Sharing Agreement**

Members agree to treat discussions around individuals or named schools as confidential and should be anonymised for the purpose of the minutes. Any data shared by members or should follow council data sharing policies and agreements.

Please sign your agreement to the ToR below:

Name:

Signature:

Role:

Date:

# Report to Schools Forum

<b>Item</b>	11
<b>Meeting Date</b>	Thursday 16 January 2025
<b>Subject</b>	Growth and Falling Rolls Fund Update
<b>Report Author</b>	Jane Davy

## Report purpose

To provide members of Schools Forum with an update report on how the Growth Fund has been spent in 24/25, to confirm the amount of Growth Fund to be carried forward into 25/26 and the allocation received in the Schools Block for both growth and falling rolls.

## Need for consideration

Consider the expenditure in 24/25 and the amount of Growth Fund to be carried forward into 25/26

## Need for decision

School Forum voted in principle at the November 2024 meeting on the use of the carry forward for 25/26. Therefore, N/A for this meeting.

## Contact Officers

Jane Davy –Finance Manager LMS Team  
01422 393543  
[Jane.davy@calderdale.gov.uk](mailto:Jane.davy@calderdale.gov.uk)



## **1. Background information and context**

- a) LA officers presented a report at the November School Forum meeting. The report asked Schools Forum to agree an amount of Schools Block DSG to be retained for 2025/2026.
- b) School Forum agreed in principle not to retain any of the Growth Fund allocated to the Schools Block in 2025/26 to fund Growth, instead any Growth Fund allocated was to be used in the first call to fund the 0.5% transfer of the Schools Block to High Needs Block.
- c) LA officers were asked to bring a report to Schools Forum once the DSG and school data had been confirmed.

## **2. Main issues for Schools Forum**

- a) Schools' individual data was announced on the 17 December 2024. LA officers used this data to calculate the 2024/25 Growth Fund allocation. The report in November estimated expenditure of £315,738 actual expenditure is £271,945. The difference of £43,793 is because the following Schools/Academies did not get the additional pupils expected; The Brooksbank School 0 (estimate 15, actual 0). All qualifying schools will receive payment for September 2024 to March 2025 in February 2025, Academies will receive a further payment in the summer term for the period April to Sept 2025. The total underspend has therefore increased by £43,793 from £2,662 to £46,455.
- b) DSG final allocations were announced on the 18 December 2024. Calderdale is to receive £307,302 for growth and £141,914 for falling rolls. Revised estimates for 25/26 growth fund is £93,844, the LA will receive funding from the ESFA to fund this due to it being for academies for the period April to Sept 25, along with the carry forward from 2024/25 of £46,455, the LA will use a total of £495,671 towards the 0.5% transfer to the high needs block, As previously reported no school is eligible for falling rolls due to not meeting the criteria. A summary of the growth estimated expenditure is shown below. A further report will be brought in autumn 2025 if there is any expected expenditure for growth and falling rolls for 26/27.

### 3. Recommendations

- a) Schools Forum notes the Growth Fund actual expenditure for 2024/25
- b) Schools Forum note that £495,671 will be used as first call on the 0.5% transfer from Schools Block to the high needs block.

### 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 still needs to agree the total 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

N/A

### 7. Appendices

Growth Fund Summary

School	Actual 24/25 £	Actual 25/26 £
Copley Primary School	31,062	0
The Brooksbank School	23,891	0
Ryburn Valley High School	216,992	93,844
<b>Total Annual Coast</b>	<b>271,945</b>	<b>93,844</b>
Budget	<b>172,886</b>	<b>0</b>
<b>Refund from ESFA for Academies</b>	109,502	93,844
<b>underspend</b>	10,443	0
<b>Brought forward from previous year</b>	<b>36,013</b>	<b>46,456</b>
<b>Carry forward</b>	<b>46,456</b>	<b>46,456</b>

# Report to Schools Forum

<b>Item</b>	12
<b>Meeting Date</b>	Thursday 16 January 2025
<b>Subject</b>	School Funding Formula 2025/26
<b>Report Author</b>	Jane Davy

## Report purpose

To inform Schools Forum of the Individual School Budget Shares (ISB) calculated through the funding formula and the final DSG Schools Block allocation.

## Need for consideration

Consider the ISB allocations and give a view

## Need for decision

Schools Forum is not legally required to make a decision. However, the views of members will be considered to determine the School Funding Formulae for 2025/26

## Contact Officers

Jane Davy- Finance Manager LMS Team  
01422 393543  
[Jane.davy@calderdale.gov.uk](mailto:Jane.davy@calderdale.gov.uk)

## 1. Background information and context

- a) In November 2024 Schools Forum was consulted on the proposals for the Funding Formulae for 2025/26. Members voted to accept the LA's request to transfer 0.5% from the Schools Block to the high needs block.
- b) The LA is proposing to follow the NFF funding factors and values as agreed in principle at the November meeting, with the exception of the Basic Entitlement value, more detail is given below at 2b. Forum members were also in agreement with the disapplication requests for Minimum Funding Guarantee (MFG) and Minimum Per Pupil Level (MPPL) adjustment for The Halifax Academy and The Calder Learning Trust.
- c) The Local Authority must submit final allocations to the ESFA for approval no later than the 22 January 2025. Upon ESFA approval the LA will inform maintained mainstream schools of their individual allocations no later than 28 Feb 2025. Academies will receive their allocation from the ESFA based on the local formulae in March 2025.

## 2. Main issues for Schools Forum

- a) Final Schools Block DSG Allocation. The ESFA announced the final allocation on the 18 Dec 2024. Calderdale have received £204.345m for the schools block, an increase of £11.8m million from 2024/25. When including the additional grants for 24/25 of £13.775m and the adjustment to pupil numbers -£3.525m for a decrease of 581 pupils (-419 Primary and -162 Secondary) the total increase equates to £1.55m. Information of DSG allocation is available on the ESFA website, below is an analysis of how the Schools Block is calculated.

	£M
Primary pupils	97.49
Secondary pupils	102.92
Rates	1.94
Split Site	0.315
PFI	1.23
Growth/Falling Rolls	0.45

b) Mainstream Individual School Funding Allocations. Calderdale has £204.345m to allocate through the funding formula. No funding is required for growth or falling rolls due to no schools being eligible as reported in Agenda item 11. School Forum agreed the request to transfer 0.5% to the high needs block at the November 24 meeting, this equates to £1.012m. The LA will use the £449,216 from growth and falling rolls, plus the carry forward of £46,456 from growth fund this leaves a balance of £516,352 to reduce the funding formula by £965,568. This has been done by reducing the basic entitlement values by the following amounts.

KS1 -£42.65

KS2 -£61.52

KS3 -£69.37

All other factors and values will remain at the NFF values.

The NFF factors and values are shown in the table below, MFG will be set at maximum amount of + 0 % and no capping will be applied.

	<b>2024/25</b>		<b>2025/26</b>	
<b>Factor</b>	<b>Primary</b>	<b>Secondary</b>	<b>Primary</b>	<b>Secondary</b>
	£	£	£	£
Basic Entitlement				
KS1 & KS2	3,549.92		3,803.99	
KS3		5,005		5,361.40
KS4		5,642		6,044.67
Deprivation				
FSM	490.08	490.08	495.08	495.08
FSM6	820.14	1,200.14	1,060.18	1,555.26
IDACI A	680.12	945.16	685.12	950.16
IDACI B	515.09	740.13	520.09	745.13
IDACI C	485.08	690.12	490.18	695.16
IDACI D	445.08	630.11	445.08	635.11
IDACI E	285.05	450.08	285.05	450.08
IDACI F	235.04	340.06	235.04	340.06
Attainment	1,170.20	1,775.30	1,175.20	1,785.30
EAL	590.10	1,585.27	595.1	1,595.27
Mobility	960.16	1,380.23	965.16	1,385.24
Lump Sum	134,422.85	134,422.85	145,124.67	145,124.67

At the time of writing the report the MFG disapplication requests have not yet been approved by the ESFA, it is anticipated, like as in the past they will be approved shortly. After running the school funding formula, it was found that only the MFG adjustment for The Halifax Academy needs to be applied to the School Funding Formula.

An impact assessment of the proposed school funding formula is shown at Appendix A.

**3. Recommendations**

To give a view on the Schools Block allocation for 2025/26.

**4. Reasons for recommendations**

To comply with the school funding regulations that the LA must consult with School Forum.

**5. Impact of funding, targets, and milestones**

See Appendix A

**6. Resource implications**

The total Schools Block DSG allocation of £204.345m will be allocated to schools through the Funding Formulae, Growth Fund and the transfer of 0.5% to the High Needs Block

**7. Appendices**

Appendix A

## Appendix A

School Name	24/25 Pupil Numbers	24/25 Individual School Budgets (including grants)	25/26 Pupil Numbers	25/26 Individual School Budgets	Difference
Abbey Park Academy	187	1,152,935	194	1,207,148	54,213
All Saints' CofE Primary School	211	1,044,768	210	1,044,118	-650
Ash Green Community Primary School	411	2,713,399	394	2,647,068	-66,331
Bailiffe Bridge Junior and Infant School	192	992,303	181	947,700	-44,603
Barkisland CofE VA Primary School	191	945,475	193	959,559	14,083
Beech Hill School	461	2,778,844	482	2,901,012	122,168
Bolton Brow Primary Academy	211	1,087,995	210	1,092,276	4,281
Bowling Green Academy	151	830,301	161	876,292	45,991
Bradshaw Primary School	326	1,619,518	321	1,607,288	-12,230
Brighouse High School	1042	7,127,970	1044	7,144,794	16,824
Burnley Road Academy	171	968,065	148	882,975	-85,089
Carr Green Primary School	308	1,589,500	304	1,573,140	-16,360
Castle Hill Primary School	168	933,903	162	917,778	-16,124
Central Street Infant and Nursery School	72	488,107	59	428,569	-59,539
Christ Church CofE VA Junior School, Sowerby Bridge	93	607,235	85	576,049	-31,186
Christ Church Pellon CofE VC Primary School	167	1,134,046	167	1,134,046	0
Cliffe Hill Community Primary School	161	1,022,761	174	1,125,866	103,104
Colden Junior and Infant School	74	513,833	62	461,368	-52,465
Copley Primary School	302	1,526,041	314	1,605,402	79,361
Cornholme Junior, Infant and Nursery School	143	913,732	117	808,066	-105,665
Cross Lane Primary and Nursery School	300	1,707,184	281	1,614,635	-92,548
Dean Field Community Primary School	201	1,259,662	197	1,248,063	-11,599
Elland Church of England (Voluntary Aided) Junior, Infant and Nursery School	142	1,012,367	124	902,809	-109,558
Ferney Lee Primary School	186	1,158,862	192	1,193,854	34,992
Field Lane Primary School	86	633,516	72	554,411	-79,105

Hebden Royd CofE Primary School	96	564,677	90	538,801	-25,876
Heptonstall Junior Infant and Nursery School	50	373,877	55	388,848	14,971
Holy Trinity Primary School, A Church of England Academy	372	2,036,048	345	1,931,210	-104,838
Holywell Green Primary School	157	896,951	140	817,952	-79,000
Lee Mount Academy	288	1,763,497	267	1,664,936	-98,561
Lightcliffe Academy	932	6,865,951	822	6,165,920	-700,031
Lightcliffe C of E Primary School	412	2,029,840	395	1,964,105	-65,735
Ling Bob Junior, Infant and Nursery School	294	1,822,348	294	1,825,759	3,411
Longroyde Primary School	357	1,917,720	345	1,894,844	-22,877
Luddenden CofE School	93	654,566	90	619,648	-34,918
Luddendenfoot Academy	193	970,770	202	1,010,754	39,984
Midgley School	71	461,479	55	395,279	-66,201
Moorside Community Primary School	210	1,375,413	204	1,348,592	-26,822
Mount Pellon Primary Academy	269	1,643,298	282	1,720,825	77,528
New Road Primary School	174	1,032,718	172	1,023,906	-8,812
Norland CE School	75	488,269	63	440,301	-47,968
Northowram Primary School	416	2,085,854	413	2,086,273	419
Old Earth Primary School	420	2,087,980	411	2,054,654	-33,326
Old Town Primary School	78	480,172	87	523,824	43,652
Park Lane Academy	425	3,757,202	488	4,305,121	547,919
Parkinson Lane Community Primary School	499	2,938,741	482	2,852,500	-86,241
Rastrick High School	1787	12,117,821	1788	12,153,896	36,075
Ripponden Junior and Infant School	182	966,740	178	949,052	-17,687
Riverside Junior School	126	708,529	118	686,826	-21,703
Ryburn Valley High School	1391	9,748,275	1414	9,999,990	251,715
Sacred Heart Catholic Voluntary Academy	180	1,050,385	167	985,154	-65,231
Salterhebble Junior and Infant School	204	1,096,698	205	1,106,729	10,031
Salterlee Primary School	93	533,067	87	521,513	-11,554
Savile Park Primary School	370	2,523,829	365	2,512,523	-11,306
Scout Road Academy	99	565,936	101	577,805	11,869
Shade Primary School	158	885,061	162	915,551	30,489
Shelf Junior and Infant School	239	1,209,286	229	1,166,927	-42,359
Siddal Primary School	170	1,051,215	161	1,020,006	-31,209
St Andrew's Church of England (VA) Infant School	162	912,117	162	912,159	42



St Andrew's CofE (VA) Junior School	221	1,213,407	238	1,295,167	81,759
St Augustine's CofE School	159	1,136,676	157	1,124,163	-12,513
St John's (CofE) Primary Academy, Clifton	204	1,028,374	196	995,092	-33,281
St John's Primary School In Rishworth	145	747,324	145	748,095	771
St Joseph's Catholic Primary Academy	150	874,498	145	850,918	-23,580
St Joseph's Catholic Primary Academy	194	1,031,216	184	985,649	-45,567
St Joseph's Roman Catholic Voluntary Academy	109	731,876	88	660,624	-71,252
St Malachy's Catholic Primary School, A Voluntary Academy	150	1,031,776	148	1,021,262	-10,514
St Mary's Catholic Primary Academy	303	1,698,456	289	1,626,950	-71,506
St Mary's CofE (VC) J and I School	87	521,447	76	476,070	-45,376
St Michael and All Angels CofE Primary & Pre School	181	961,931	174	938,983	-22,948
St Patrick's Catholic Primary Academy	95	604,689	97	618,642	13,953
Stubbings Infant School	41	322,798	47	348,799	26,001
The Brooksbank School	1400	9,771,125	1344	9,441,323	-329,801
The Calder Learning Trust	1345	9,059,713	1292	8,770,815	-288,897
The Crossley Heath School	900	5,818,648	898	5,836,519	17,871
The Greetland Academy	398	2,046,279	397	2,054,761	8,482
The Halifax Academy	1437	10,615,339	1451	10,738,290	122,951
The North Halifax Grammar School	902	5,821,818	899	5,848,890	27,072
Todmorden CofE J, I & N School	200	1,128,714	197	1,121,061	-7,653
Todmorden High School	875	6,322,837	850	6,206,696	-116,141
Triangle CofE VC Primary School	186	986,308	178	959,282	-27,026
Trinity Academy Akroydon	257	1,496,173	233	1,371,036	-125,137
Trinity Academy Grammar	999	8,129,732	986	8,139,192	9,461
Trinity Academy Halifax	1616	12,052,552	1621	12,093,608	41,056
Trinity Academy St Chad's	141	757,130	129	714,092	-43,037
Trinity Academy St Peter's	104	710,101	101	693,815	-16,286
Tuel Lane Infant School	57	440,521	57	442,087	1,566
Wainstalls School	199	1,007,143	210	1,060,474	53,331
Walsden St Peter's CE (VC) Primary School	174	926,206	174	929,465	3,259
Warley Road Primary Academy	441	2,506,736	441	2,521,319	14,583
Warley Town School	134	753,221	131	744,230	-8,990
West Vale Academy	101	665,200	84	578,198	-87,002
Whitehill Community Academy	617	3,251,577	590	3,117,040	-134,537

Withinfields Primary School	301	1,610,492	306	1,665,056	54,565
Woodhouse Primary School	418	2,086,753	417	2,103,636	16,883
<b>Total</b>	<b>32,240</b>	<b>205,247,436</b>	<b>31,657</b>	<b>203,377,771</b>	<b>- 1,869,664</b>

# Report to Schools Forum

<b>Item</b>	13
<b>Meeting Date</b>	Thursday 16 January 2025
<b>Subject</b>	Maintained School Balances
<b>Report Author</b>	Jane Davy

## Report purpose

To provide Schools Forum with the latest financial projections for maintained schools for the financial year 2024/25

## Need for consideration

Schools Forum to note the current position.

## Need for decision

n/a

## Contact Officers

Jane Davy-LMS Finance Manager  
[Jane.davy@calderdale.gov.uk](mailto:Jane.davy@calderdale.gov.uk)  
01422 393543

## **1. Background information and context**

- a) All schools hold revenue balances at the end of each year to allow for unforeseen events and emergencies, and in some cases to smooth out the effects of changes in school rolls, changes to staffing structures and one off expenditure.
- b) This report covers Calderdale's 49 maintained schools (1 through school, 1 secondary, 44 primary and 3 special Schools) and excludes academies.
- c) Schools Forum agreed to suspend the clawback mechanism for the financial year 2024/2025. Therefore, this report is for information only.

## **2. Main issues for Schools Forum**

- a) At the end of the 2023/24 financial year, total school balances in Calderdale (excluding academies) were £11.11 million: primary schools £5.95 million, secondary (inc through school) schools £2.13 million and special schools £3.03 million.
- b) In setting their 2024/25 school budgets, maintained primary schools planned to reduce their balances by the end of the financial year to £4.01 million, maintained secondary schools planned to have balances of £2.22 million, and special schools planned to have balances of £1.87 million. This would give total planned balances of £8.1 million.
- c) The Autumn term monitor shows maintained primary schools are projecting to have balances at the end of the year of £4.24 million, maintained secondary schools are projecting surplus balances totalling £2.23 million and special schools are projecting £2.81 million. This would give total projected balances of £9.28 million at the end of March 2025 an increase of £1.18 million from planned budgets.
- d) At the June School Forum meeting it was agreed to suspend the balance control mechanism for 24/25.
- e) Using recommended thresholds of 20% balance of all income, 2 primary schools and 1 special school are projecting balances for 2024/25 above the recommended threshold. 2 of the schools were above recommended thresholds at the end of the 2023/24 financial year.

- f) 1 Primary School is forecasting to be in deficit of £9.5k and 7 primary schools are projecting balances to be less than £20k or 2% of total income by 31 March 25.
- g) Overall balances increased during 2023/24 and based on autumn term monitors schools are forecasting an increase in balances during 2024/25 and against planned budgets.
- h) A summary of schools balances is shown in Appendix A

### **3. Recommendations**

- a) The current projections provided by schools are noted.
- b) A further update is provided in April 2025 based on spring term projections.

### **4. Reasons for recommendations**

To enable Forum to give a view on maintained school balances.

### **5. Impact of funding, targets, and milestones**

No impact unless clawback mechanism is implemented.

### **6. Resource implications**

No Impact unless clawback mechanism is implemented

### **7. Appendices**

Calderdale Schools - Budget Monitoring 2024/25

## Calderdale Schools - Budget Monitoring 2024/25

School Name	Surplus bfwd	Budgeted Income  2024/25  £	Original Budget 2024/25			Autumn Term Monitoring	
	2024/25		In-year deficit or surplus £	Original forecast £	Year End Balances %	Revised forecast £	Year End Balances %
	£						
PRIMARY SCHOOLS		Total					
All Saints' CE (VA) J & I School	85,705	1,233,352	-68,427	17,278	1.40%	72,519.50	5.83%
Ash Green Primary School	156,417	3,554,933	-12,273	144,144	4.05%	219,120.00	5.45%
Bailiffe Bridge J & I School	127,803	1,086,390	-58,617	69,186	6.37%	91,352.10	7.92%
Barkisland CE (VA) Primary School	141,309	1,099,269	-27,757	113,552	10.33%	122,846.81	8.86%
Carr Green J, I & N School	51,953	2,012,545	9,650	61,603	3.06%	59,371.00	2.93%
Castle Hill J & I School	41,170	1,203,564	-40,582	588	0.05%	70.25	0.01%
Central Street Infant & Nursery School	118,974	758,796	6,279	125,253	16.51%	96,366.96	11.11%
Christ Church (Pellon) CE (VC) Primary School	-47,601	1,547,441	25,903	-21,698	-1.40%	19,356.37	1.17%
Christ Church CE (VA) Junior School (Sowerby Bridge)	81,077	804,569	-39,752	41,325	5.14%	27,273.51	3.28%
Cliffe Hill Community Primary School	32,325	1,667,702	-6,557	25,768	1.55%	3,500.50	0.21%
Colden J & I School	18,102	626,014	7,945	26,047	4.16%	21,781.95	3.43%
Copley Primary School	325,412	1,891,643	-78,146	247,266	13.07%	288,270.93	14.65%
Cornholme J, I & N School	81,113	1,086,787	-73,249	7,864	0.72%	17,464.70	1.50%
Cross Lane Primary & Nursery School	84,174	2,201,528	26,689	110,863	5.04%	119,313.14	5.33%
Elland CE (VA) J, I & N School	353,113	1,262,242	-140,354	212,759	16.86%	235,090.93	18.14%
Ferney Lee Primary School	129,481	1,548,403	-41,831	87,650	5.66%	112,246.49	7.02%
Holywell Green Primary School	61,707	1,077,003	-22,083	39,624	3.68%	17,249.95	1.53%
Ling Bob J, I & N School	205,933	1,699,141	-68,831	137,102	8.07%	223,250.00	9.12%
Longroyde Junior School	57,603	2,471,010	9,104	66,707	2.70%	112,559.70	4.43%
Midgley School	207,356	552,898	-62,886	144,470	26.13%	141,313.38	23.63%
Moorside Community Primary School	153,461	1,992,750	-24	153,437	7.70%	144,698.30	7.20%
New Road Primary School	224,278	1,251,284	49,459	273,737	21.88%	300,116.98	22.88%

Norland CE (VC) J & I School	84,887	557,122	7,188	92,075	16.53%	73,760.45	13.31%
Northowram Primary School	56,693	2,547,195	-53,219	3,474	0.14%	60,426.54	2.29%
Old Town Primary School	712	611,284	265	977	0.16%	767.00	0.12%
Parkinson Lane Community Primary School	999,387	3,497,966	-604,925	394,462	11.28%	403,100.00	11.24%
Ripponden J & I School	155,913	1,167,660	-4,081	151,832	13.00%	95,964.00	7.67%
Riverside Junior School	129,430	1,816,522	-21,117	108,313	5.96%	56,228.00	5.08%
Salterhebble J & I School	45,284	1,297,992	-6,999	38,285	2.95%	21,314.38	1.61%
Savile Park Primary School	130,404	2,860,008	-29,517	100,887	3.53%	0.00	0.00%
Shade Primary School	33,005	1,120,947	-26,826	6,179	0.55%	36,585.31	3.04%
Shelf J & I School	76,443	1,356,061	-36,717	39,726	2.93%	56,375.21	4.00%
St Andrew's CE (VA) Infant School (Brighouse)	76,808	1,161,431	-50,778	26,030	2.24%	89,082.29	7.36%
St Andrew's CE (VA) Junior School (Brighouse)	156,597	1,508,933	-80,452	76,145	5.05%	95,940.21	6.26%
St Mary's CE (VC) J & I School (Sowerby Bridge)	78,817	621,210	-3,707	75,110	12.09%	70,064.79	11.00%
St Michael & All Angels CE Primary School	122,960	1,249,646	-51,453	71,507	5.72%	100,022.43	7.74%
Stubbings Infant School	97,361	388,775	-30,206	67,155	17.27%	71,707.00	15.82%
Todmorden CE (VA) J & I School	370,812	1,582,388	-148,354	222,458	14.06%	214,330.16	13.25%
Triangle CE (VC) Primary School	89,733	1,153,706	-34,807	54,926	4.76%	32,895.92	2.87%
Tuel Lane Infant School	48,095	610,265	-31,921	16,174	2.65%	-9,401.93	-1.52%
Walsden St Peter's CE (VC) Primary School	172,853	1,040,983	-71,762	101,091	9.71%	105,948.20	9.77%
Warley Town School	88,292	856,836	583	88,875	10.37%	83,473.71	9.24%
Withinfields Primary School	135,307	2,349,283	-8,048	127,259	5.42%	69,096.05	2.89%
Woodhouse Primary School	110,812	2,284,749	-43,964	66,848	2.93%	73,039.79	3.20%
<b>TOTAL PRIMARY SCHOOLS</b>	5,951,471	64,270,226	-1,937,157	4,014,314	6.25%	4,245,853	1506.59%
					1		2

School Name	Surplus bfwd  2024/25	Budgeted Income  2024/25	Original Budget 2024/25			Autumn Term Monitoring	
			In-year deficit or surplus £	Year end balances		Year end balances	
				£	%	£	%
<b>SECONDARY SCHOOLS</b>							
CALDER HIGH SCHOOL	1,110,512	9,738,511	67,972	1,178,484	12.10%	1,257,524.00	12.91%
TODMORDEN HIGH SCHOOL	1,021,120	6,618,026	19,740	1,040,860	15.73%	971,052.09	14.67%
<b>TOTAL SECONDARY SCHOOLS</b>	2,131,632	16,356,537	87,712	2,219,344	13.57%	2,228,576	13.62%
					0		0

School Name	Surplus bfwd  2024/25	Income  2024/25	Original Budget 2024/25			Autumn Term Monitoring	
			In-year deficit or surplus £	Year end balances		Year end balances	
				£	%	£	%
<b>SPECIAL SCHOOLS</b>							
HIGHBURY SCHOOL	500,759	4,372,116	68,914	569,673	13.03%	572,320.00	13.09%
RAVENSCLIFFE HIGH SCHOOL	1,101,237	6,708,244	-482,043	619,194	9.23%	774,463.00	11.54%
WOODBANK SCHOOL	1,429,779	3,396,155	-750,794	678,985	19.99%	1,459,048.00	42.96%
<b>TOTAL SPECIAL SCHOOLS</b>	<b>3,031,775</b>	<b>14,476,515</b>	<b>-1,163,923</b>	<b>1,867,852</b>	12.90%	<b>2,805,831</b>	19.38%
					0		1

<b>TOTAL ALL SCHOOLS</b>	<b>11,114,879</b>	<b>95,103,278</b>	<b>-3,013,368</b>	<b>8,101,511</b>	<b>8.52%</b>	<b>9,280,260</b>	<b>9.79%</b>
					1		3



# **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
<b>Meeting Thursday 14<sup>th</sup> November 2024</b>	Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	<b>Wednesday 30<sup>th</sup> October 2024</b>
	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 Hamish Heald	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	
<b>Meeting Thursday 16<sup>th</sup> January 2025</b>	Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	<b>Monday 6<sup>th</sup> January 2025</b>
	Review of Schools Forum Constitution and membership	Ian Hughes	Verbal Consultation / Decision	
	De-Delegation of Unions Facility Fees	Jane Davy Hamish Heald	Decision	
	Early Years Funding Formulae and Centrally Retained Funds 2024/25	Martyn Sharples	Decision	
	Approval of Central School Services Block DSG for 2025-26	Steve Drake	Decision	
	High Needs Block Recovery Plan <ul style="list-style-type: none"> <li>Financial Forecast 2024/25 &amp; 2025/26</li> <li>Actions to date</li> <li>How is Basic Needs Funding and High Needs Capital Fund supporting the High Needs deficit Recovery Plan?</li> <li>Feedback of the 0.5%</li> </ul>	Emma Ingham	Information	
	Growth Fund & Falling Rolls	Jane Davy	Information	

Meeting date	Reports	Officer	Report for:	Deadline for papers
	Update on School Funding Formula	Jane Davy	Information	
	Update on Maintained School Balance	Jane Davy	Information	
<b>Monday 24<sup>th</sup> February (Exception Meeting)</b>	High Needs Block Funding 2025-26	Emma Ingham Jane Davy Steve Drake	Information	<b>Monday 10<sup>th</sup> February</b>
	Central Block	Steve Drake	Information	
	Early Years Funding Formulae and Centrally Retained Funds 2024/25 - addendum	Martyn Sharples	Information	
<b>Thursday 24<sup>th</sup> April 2025</b>	Cluster Paper	Connie Beirne	Information	
	Update on Schools Rebuilding Programme (Capital Projects on Special Schools)	Richard Morse	Information	