

## Schools Forum Exception Meeting

**Date:** 24 February 2025

**Time:** 4.30pm

**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

Vacant

#### 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>Academy Bursar Substitute</b>	David Sheard (Trinity MAT)
<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)	

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 16 January 2025**

5. **High Needs Block Funding 2025/26 Information**

**Steve Drake**

6. **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.

7. **Future Dates**

**Jemima Flintoff**

24 April 2025

3 July 2025

All meetings will start at 4pm

Venue: Virtual Teams Meeting

## **CALDERDALE SCHOOLS FORUM**

### **16 January 2025 – Virtual Meeting Via Teams**

#### **PRESENT:**

**Karen Morley** (Academy) – Co-Chair  
**Mungo Sheppard** (Primary Maintained)  
**John Eccleston** (Academy Primary Governor)  
**Stuart Hillary** (Academy Secondary)  
**Karl Veltman** (Post 16 Representative)  
**Dan Burns** (Academy Primary)  
**Gareth Morris** (Primary Governors Maintained)  
**Andrea Dyson** (Early Years Rep)  
**Louise Downing** (Primary Governors Maintained)  
**Adam McNichol** (Academy Bursar)  
**Gill Shirt** (Secondary Governor Maintained)  
**Rachel Harling** (Academy Secondary)  
**Brenda Monteith** (Roman Catholic)  
**Denise Gwizdak** (Early Years Rep)  
**Hamish Heald** (Union Representative)  
**Kevin Rivett** (Unions Representative)

#### **IN ATTENDANCE:**

**Jemima Flintoff** (AD Education and Inclusion)  
**Connie Beirne** (Interim Service Manager for Early Years and School Strategy and Performance)  
**Emma Ingham** (SEND & Inclusion Service Manager)  
**Ian Hughes** (Legal Officer)  
**Jane Davy** (Finance Manager)  
**Martyn Sharples** (Senior Finance Officer)  
**Victoria Coyle** (SEN Manager)  
**Steve Drake** (Finance Manager)  
**Corinne Kielty** (Calderdale Finance Officer – observing)  
**Amanda Farron** (Senior Finance Officer - observing)  
**Mick Burns** (Union Representative - observing)

#### **APOLOGIES**

**Lauren Watson** (Primary Maintained)  
**Debbie Sweet** (Special School)  
**Stephen Baines** (Academy Secondary)  
**Phil Hannah** (Academy AP)  
**Richard Horsfield** (Academy Secondary)  
**Cllr Wilkinson** (Cabinet Member – Observing)  
**Ivan Kuzio** (Academy Bursar)

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

None

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

John Eccleston is a member of 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 Governor at 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

Corinne Kielty – Calderdale Finance Officer

**4. Minutes of the Schools Forum held on 14 November 2024**

Hamish Heald (Union Representative) to be moved from 'in attendance' to 'present' for the purpose of the minutes.

Amend Rachel Harling to Academy Secondary on 'in attendance'

Item 14 - amend to 89.5% schools rated good and outstanding

Minutes approved by Schools Forum

**5. Election of Chair and Co-Chair**

Karen Morley will remain as Co-Chair for the interim

**6. Review of Schools Forum Constitution and membership**

PALT has been established on the 1st January. The Co-Chair will review the membership of Schools Forum for the next meeting.

**7. De-Delegation of Funding 2025-26**

The Co-Chair thanked Hamish and Jane for the paper. It shows in the report that the charges for Calderdale are lower than neighbouring authorities. The Co-Chair was in favour of the flat rate but looking at the staffing ratio's in Primary and Secondary, the ratio of secondary to primary is 1.38 to 1.00 which ought to be taken into account.

The Co-Chair had considered, prior to the meeting, guidance in relation to using funds from the central budget to pay for the deficit and felt that this could be justified in accordance with

the guidance by saying the use of this service is available to all schools and on a yearly basis the local authority charge for their direct cost of administration based on all schools joining. It was noted that very soon, all Calderdale secondary schools will be academies and vast majority of primaries will be academies.

Gareth Morris Q: is more work being undertaken in primary schools than secondary schools? Hamish said the work undertaken in primary and secondary feels fairly even however this is without having the figures in front of him. The in-house HR in the academy schools doesn't have too much of an effect on the work, due to it being on a case-by-case basis.

Rachel Harling Q: Are we setting a precedence here for other services that go into deficit by calling on the central funds to address the problem?

Jane said we would have to consider any deficit position being recovered from CSSB on an individual basis. If we agreed this, it would be a one-off payment because of services being made available to all schools and in future a realistic rate would be set. There is a very small amount of de-delegation in Calderdale. The only other we have is School Improvement and I am not expecting to call on the central block again. Union Facilities has been very unsettled the last few years but has been improving with more permanent staff in post.

Rachel Harling Q: with regards to the £21,938.67 deficit, I can see this relates to 23/24. Is there a current year deficit to add?

Hamish said that in 24/25, they have been working hard to bring academies on board for the additional income and there is a feeling there won't be a deficit for this year. There has been more success having a targeted approach towards academies and asking them to pay into the facilities pot. The MATS would prefer a flat rate and with Todmorden High joining the Share MAT, there will be no secondary schools to vote on the higher or lower rates going forward.

Primaries ratified the decision already made at the November meeting to de-delegate. Secondaries voted in favour of the de-delegation.

**Members were asked to vote on the deficit be funded from the CSSB contingency**  
6 approve  
2 oppose

**Maintained representatives only were asked to vote on option two:**  
**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.**

4 votes approve  
0 oppose

### **Approval**

1. Secondary funds to be de-delegated for union facilities time
2. Ratified previous approval that Primary funds be de-delegated for union facilities time.
3. To meet the deficit of £21,938.67 from the CSSB 2024/25 contingency
4. De-delegate £3.79 for primary and £5.24 for secondary

## **8. Early Years Funding Formulae and Centrally Retained Funds 2025-26**

The Co-Chair highlighted that the information given in the report is understandable and thanked Martyn for his report and his contribution to Schools Forum.

Andrea Dyson, on behalf of the PVI Sector, would like it noted that we are providing early years on a very uneven playing field compared to School Nurseries. PVI's are subject to VAT, pay business rates and the school nurseries are to receive a grant to cover the upcoming increase in Employer's National Insurance contributions. As an example, EEF funding in 2025 is increasing 3.7% whilst (Totspot Day Nursery as a specific example) payroll is rising by 11% which is a huge gap. Calderdale has lost 97 settings and 1400 early years places since 2020 and it is anticipated that there will be a shortage of places available from September 2025 when Under 2's will also be eligible for the 30 hours working parent funding. Many settings are also struggling with recruitment and retention and settings are not able to pay higher wages owing to levels of funding. This impacts on the number of spaces settings can or will provide.

Martyn added that from the report, you will be aware of the cost pressures in for the majority of providers in the market. In terms of the pressure from September 2025 and the need for additional funded places for the 2-year-olds and under 2 with working parents, the government is going to provide a one off grant of £75 million to support the costs that are due to happen in September. Unfortunately, the LA do not have any detail on how this will be allocated or the conditions of grant.

Schools Forum approved the following 4 recommendations:-

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 year's entitlements (excluding EYPP and DAF). The following table shows a breakdown of the Centrally Retained Funding for 2025/26 compared with 2024/25

## **9. Approval of Central School Services Block DSG for 2025-26**

Steve Drake presented the Central Schools Service Block proposed allocation for 2025/26 and the projected underspend for 2024/25 and asked how Schools Forum would like to use the potential underspend of £155k.

Mungo Sheppard Q: do LA officers have any ideas to contribute as to what the money could be offset against?

Jemima said that the LA could look at various options and consult with CPHA and CASH and to then come back to Schools Forum to gain Schools Forum views.

Rachel Harling Q: are we able to look back and see what contingency is required? Should the money be spent this year on initiatives that are in real need of support?

Connie replied that last year, it was useful having the contingency and additional funds were given to the clusters. We are working collectively to address needs and those discussions

with CPHA and CASH would be useful to start the development of the strategy to then come back to Schools Forum to focus on further work that can be completed with schools.

The Co-Chair asked that Jemima, Connie and Steve to consult with CASH and CPHA members and bring back a report for the Schools Forum in April.

Schools Forum approved the recommended allocation of the 2025/26 Central School Services Budget (CSSB) as set out in the report and noted that 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 – Schools Forum members approved.

## **10. High Needs Block Recovery Deficit Plan**

The Co-Chair highlighted that this is a holding report, and a more detailed report will be available at the Schools Forum Exception meeting on Monday 24<sup>th</sup> February. She advised that it would be useful to have the Special Schools funding information included in the future report to help understand special school budgets and give a total view of the High Needs funding. It was requested that the report should include more information on the LA's capital schemes for special needs provision and also the Alternative Provision capital scheme.

Mungo Sheppard Q: are there any more details around the proposed Three Ways and Delta sites? John Eccleston Q: this is a useful start but its going to be a long journey in looking at special school places and the additional places required in mainstream schools to ensure the sufficiency in places for children in need of specialist education.

Jemima responded that the Capital funding for Three Ways and Delta does not come through Schools Forum, but Richard Morse can compile a report on the projects for the Schools Forum meeting in April. The LA are working on a Sufficiency Audit to understand localities and primary needs to have a transparent planning approach to where we put provisions in the future. Once this is at a more finalised stage, this can also be brought to a future Schools Forum meeting for information.

Dan Burns Q: 10 exceptional funding requests are agreed, how many are there in total? Emma responded that there are 15 in total however this doesn't mean that the remaining requests didn't receive funding. Some of the requests could be processed through top up funding which meaning those schools still benefitted, and we didn't overspend. The remaining £135k from the 0.5% Schools Block top slice is available for schools who submit requests within the next 3 months.

Dan Burns Q: are the successful requests published and if not, can they be made available? Emma replied that due to the risk of identifying individual children it is not appropriate to share details with Schools Forum, but this information is with the HNB reference group, CPHA and the settings involved.

Jane would like to make Schools Forum aware the Special Schools have not been completed due to only receiving the DSG in late December. Meetings are attended by relevant officers to oversee the High Needs Block which will feed into the report for Schools Forum on 24<sup>th</sup> February. She advised the LA will be consulting with Special Schools once it has been agreed needs to happen with the funding.



Mungo Sheppard commented that it is essential that there is transparency and clear communications.

## **11. Growth Fund & Falling Rolls**

The recommendation that Schools Forum are to note that £495,671 (which includes £46,455 underspend from growth fund from 2024/25) will be used as first call on the 0.5% transfer from Schools Block to the High Needs Block was approved.

## **12. Update on School Funding Formula**

Schools Forum were requested to give a view on the Schools Block allocation for 2025/26. Schools Forum noted the schools block DSG allocation through the funding formula, noting that 0.5% of the school's block DSG is allocated to the High Needs Block.

## **13. Update on Maintained School Balance**

Schools Forum were asked to note the current position. A further report will be brought to the meeting in April which will be based on Spring term predictions. Woodbank School have a large amount in carry-forward due to the plans for a hydrotherapy pool being installed and extra places but the LA are expecting them to be below the 20% once the capital works have been completed.

Gareth Morris Q: with regards to suspending the clawback mechanism, on the June minutes it says that the balance control mechanism was to continue for another year?

Jane responded that the LA could apply this to schools with an excessive balance and can clawback funds from maintained schools only. It was agreed to suspend it at the June meeting but to keep the mechanism in the local funding arrangements. Use of the clawback was suspended through Covid and following that due to the high increase in teachers' pay and support staff increases. It was suspended this time due to the high number of academies and from April, the LA will only have around 40 primary schools

Gareth Morris Q: is there any threshold as to what the LA sees and an excessive balance or that there is a power to claw back all or part of it?

Jane explained this is 20% of all income which was agreed and in line with academies. The LA have never clawed back before but it would come to Schools Forum to agree what we would clawback and what it would be spent on.

Gareth Morris Q: is there a national picture on what is being held and spent in the academy sector?

Jane said we can see how much academies have as they publish their accounts on their websites. Jane looks at this and writes a report on academy balances for LA officers.

John Eccleston raised his concerns around a poorer experience being delivered for children based in schools with lower income. He is happy if Jane is pleased that schools are using money in the correct way.

Jemima added that the LA monitors schools' positions, and currently the majority of schools have an in-year deficit. As an LA, we can issue financial warning notices if schools aren't spending their funding correctly but there are no concerns currently. Jane added that the LA have a meeting called Schools Causing Concern to discuss any schools which may be a concern and team around the school meetings to help support. The LA meet with schools and the School Improvement Team to confirm the money is being spent appropriately. We are monitoring the schools in deficit closely.

Co-Chair Q: if you are monitoring the MATS and academies and you noted they were heading towards financial difficulties, would you have a hands on or hands off approach? Jane confirmed this would be hands off approach due to them not being an LA school. However, these concerns are raised at Schools Causing Concern to which Connie or Jemima would raise with DfE colleagues. There are no concerns currently.

Schools Forum agreed with the recommendations in the report.

#### **18. Any Other Business**

During the meeting, it was brought to Schools Forum's attention that Martyn Sharples (Senior Finance Officer) was retiring and that this would be his last meeting. The Co-Chair thanked Martyn for his services and on behalf of Schools Forum wished him well in his retirement.

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**

24 February 2025 – Exception meeting

24 April 2025

3 July 2025

All meetings will start at 4pm

Venue: virtual Teams Meeting

# Report to Schools Forum

<b>Item</b>	5
<b>Meeting Date</b>	24 February 2025
<b>Subject</b>	High Needs Block Funding 2025-26
<b>Report Author</b>	Steve Drake

## Report purpose

To inform Schools Forum members as to the Dedicated schools grant (DSG) High Needs Block allocation for 2025/26 along with an overview on how this funding is to be utilised

## Need for consideration

Schools Forum is asked to note the allocation of the 2025/26 High Needs DSG and be aware of the extreme funding pressures we have in delivering the services funded by this grant

## Need for decision

Schools Forum is asked to note the allocation of the 2025/26 High Needs DSG

## Contact Officers

[Steve.drake@calderdale.gov.uk](mailto:Steve.drake@calderdale.gov.uk)

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

- a) Local authorities are required to advise their schools forums on the proposed use of the High Needs block (HNB) funding
- b) The operational guide sets out restrictions on how authorities can spend their allocations, and that authorities have flexibility to move money to and from their High needs block into and from other DSG blocks if they wish. Schools forum have approved a movement of 0.5% from schools block into HN block in 2025/26. This equates to £1,012,024
- c) The High needs funding system supports provision for children and young people with Special educational needs and disabilities (SEND) from their early years to age 25, enabling both local authorities and institutions to meet their statutory duties under the Children and Families act 2014  
  
High needs funding is also intended to support good quality Alternative Provision (AP) for pre-16 pupils who, because of exclusion, illness or other reasons, cannot receive their education in mainstream or special schools. The High needs funding block provides local authorities with resources for place funding and top up funding for institutions, and funding for high needs services delivered directly by the authority or under a separate funding agreement with institutions, as permitted by regulations
- d) The use of High needs DSG funding is very specific. Attached in Appendix 1 is an extract from the Section 251 regarding the uses of the High Needs funding. Section 251 is part of the Apprenticeships, Skills, Children and Learning Act 2009
- e) There is severe pressure on the High Needs budget and there has been an overspend in 2022/23 & 2023/24 which we are required to address and reduce. The brought forward overspend into 2024/25 was £6.123m and we are forecasting an overspend of £14.647m in 2024/25 which will mean a cumulative of overspend of £20.77m at the end of 2024/25. Local authorities who are overspending their High Needs budget are required to maintain a High needs deficit recovery plan and the DFE work with authorities to try & mitigate the overspend and require Schools forum to receive regular updates regarding High needs and the Management Plan is a standard item on each forum agenda

- f) A High Needs deficit recovery group has been set up to look at ways of addressing the pressures on the budget and meets on a regular basis. The group has members from all areas of the High needs spending areas

## 2. Main issues for Schools Forum

- a) The 2025/26 High Needs allocation is £36,310,431. The allocation in 2024/25 was £32,967,286 which means an increase of £3,343,145
- b) A block transfer of £1,012,024 has been made from the Schools Block into High Needs meaning a total funding envelope of £37,322,455
- c) A detailed breakdown of the total budget requirement is shown in Appendix 2. The total required is £53,106,247 which will mean a forecast overspend of £15,783,792. A narrative description of what each of the budget areas of spend is shown below.
- d) **Special schools £13,399,336** Funding includes place funding, top ups for all three special schools including the hubs, the special school additional grants and a contingency for growth and increases to individual pupil top ups. Special schools will also receive an additional grant funded outside the high needs block based on 24/25 CSSB, TPG & TPEG.
- e) **Top ups £11,055,233** Budget is based on current top ups plus a 3% increase from 24/25, EFR that were approved in 24/25 and a contingency of 20% on maintained and academy top ups for forecasted increase in plans.
- f) **Resource provision £1,091,543** Budget is based on the current resource provision plus growth for new ARPS plus a 3% contingency for increase to top ups following reviews of current provision.
- g) **TWAPA £1,601,467** Budget based on the current SLA which includes Historical TPG, TPEG and supplementary funding. The TWAPA will also receive an additional grant funded outside the high needs block based on 24/25 CSSB, TPG & TPEG.
- h) **Additional alternative provisions and EFR £1,012,024** This budget is the 0.5% transfer from the schools block and will be used to fund setting up additional alternative provision and additional EFR.
- i) **Speech & Language therapy (SALT) £225,175** This is the value of the existing commissioned service

- j) **Disabled childrens team £136,178** Funding is required to pay for the existing 2.5 FTE Occupational therapy posts in the team
- k) **Specialist inclusion £3,200,000** Funding is required for the Autism team, Cognition & Learning team, Early Years SEND team, Visual & Multisensory team & the Hearing Impairment & Moving & Handling Team
- l) **EHC support £2,840,000** EHC support is Post 16 College provision & Education other than at school (EOTAS) for young people with EHC plans and bespoke packages of support (including music therapy, horse riding, activities & sports). There is also a requirement to fund specialist equipment & loan store, mediation, OT support and other one off special support
- m) **Medical needs team £300,635** This funding is required to fund the team of staff who support children who'se medical needs mean they cannot access schools
- n) **Special extra district £16,500,000** This funds children being accommodated in special, independent and private provision both within Calderdale & out of area rather than in our own mainstream or special schools. There continues to be a significant increase in Independent and non maintained special school placements, reflecting the increased demand for special school places and the lack of capacity in our own maintained special schools. Individual children with complex learning and behavioural needs require bespoke provision and this is the subject of potential capital projects to provide in house provision in Calderdale
- o) **Central overheads, management and other central high needs DSG funded staff costs £544,656** The High needs funding rules allow us to budget for a maximum of 1.5% of the total High needs DSG allocation to pay for these costs. The actual costs will be higher than this budget & will be funded by Local authority base budget and other external grant funding
- p) **Senif / Early years high needs DSG £1,150,000** This is the budget required for the cost of 2,3 & 4 year olds in receipt of EHC plans
- q) **Post 18 development officer £50,000** This post is to support young people with SEND to make a positive transition to adulthood, including paths to employment, good adult health, independent living and participating in society

### 3. Recommendations

Schools Forum is asked to note the content of the report and support the recommended use of the High Needs funding envelope for 2025/26

**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 : Extract from Section 251 guidance – use of High needs budget

Appendix 2 : Analysis of High needs DSG budget by area of spend

## **Appendix 1**

### **Top-up funding – maintained schools**

Include planned expenditure on top-up funding for maintained schools, including PRUs.

Top-up funding is paid to schools for pupils with high needs in:

- mainstream classes
- special units and resourced provision attached to mainstream schools
- special schools
- PRUs
- sixth forms

Top-up funding is usually administered directly by local authorities from a central high needs budget. Where such funding has been devolved to groups of schools or individual schools for them to decide what to pay other schools (for example, when a school pays top-up funding for a pupil it places in a PRU), this funding should also be included. It is important, however, that this excludes any funding already in schools' budget shares and included in line 1.0.1. This line should also include any high needs funding paid to maintained special schools and PRUs for teachers' pay and pensions (employer contributions) costs, under the additional condition of grant attached to local authorities' DSG (section 3.6(7)).

Monies paid to local authority maintained special schools (including hospital schools) and PRUs (including medical PRUs) under the additional condition of grant that requires payment of a sum equivalent to 3.4% of total grant funding should also be included in this line.

### **Top-up funding – academies, free schools and colleges**

Include planned expenditure on top-up funding for academies and free schools. Top-up funding is paid to academies for pupils with high needs in:

- mainstream classes
- special units and resourced provision attached to mainstream academies and free schools
- special academies and free schools
- AP academies and free schools
- academy and free school sixth forms

Also include, in the 'post-school' column, top-up funding for students with high needs in:

- FE colleges
- sixth form colleges
- 16 to 19 schools and academies without pupils of compulsory school age
- local authority post-16 provision



Top-up funding is usually administered directly by local authorities from a central high needs budget. Where such funding has been devolved to schools and academies for them to decide what to pay other schools (for example, when an academy pays top-up funding for a pupil it places in an AP free school), this funding should also be included. It is important, however, that this excludes any funding already in academies' budget shares and included in line 1.0.1. This line should also include any high needs funding paid to special academies and free schools, and to AP academies and free schools, for teachers' pay and pensions (employer contributions) costs, under the additional condition of grant attached to local authorities' DSG (section 3.6(7)).

Monies paid to special academies and free schools (including hospital schools), and to AP academies and free schools (including medical AP facilities), under the additional condition of grant that requires payment of a sum equivalent to 3.4% of total grant funding should also be included in this line.

### **Top-up and other funding – non-maintained and independent providers**

Include planned expenditure on top-up funding for non-maintained special schools in the special schools column.

Planned expenditure on pupils with EHC plans at independent special schools, including pupils in their sixth forms, should be included in the special school column.

Planned expenditure on mainstream independent schools should be recorded in the primary or secondary columns, as for mainstream maintained schools and academies.

In the post-school column include planned expenditure on top-up funding for:

- students at independent learning providers of post-16 education and training (previously called commercial and charitable providers)
- independent specialist colleges
- other independent special post-16 institutions

While independent and non-maintained provision frequently offers integrated education, health and social care provision, only educational costs should be charged to the DSG. The social care element of accommodating children with SEN in schools should be recorded elsewhere (for example, 3.1.1). In the event that health costs are recorded here (for example, paid up-front as part of an integrated package of support), they should be recorded with associated health income.

### **Additional high needs targeted funding for mainstream schools and academies**

Include expenditure from the local authority's high needs budget which is given to mainstream schools and academies (and exceptionally colleges) to ensure they have

enough funding to meet additional support costs up to £6,000 for pupils with SEN, where they cannot reasonably do this out of their budget share or other mainstream funding.

Local authorities were asked to give more detailed information in their APT return (including the amounts and criteria) about such targeted funding for mainstream schools. More information is available in the detailed [APT guidance](#).

### **SEN support services**

Include the costs of non-delegated centrally retained specialist SEN support services for children with and without EHC plans, whether supported directly by the local authority or commissioned by them. This will include services for:

- visual, hearing and physical impairment
- specific learning difficulties
- speech, language and communication
- profound and severe learning difficulties
- autism

You should include:

- the costs of these services for 0 to 5-year-olds
- any costs of providing these services to home educated children
- the costs of early years special educational needs coordinators (SENCOs) who are centrally managed across a number of early years providers

Do not include the costs of behaviour support services which are not in support of SEN (see line 1.1.2).

Do not include recharges or the cost of assessing the need for and monitoring SEN provision. This should be included in 'Other Education and Community Budget', line 2.1.2, under 'Monitoring of SEN provision'.

### **Hospital education services**

Hospital education is defined in the regulations as education provided at a community special school or foundation special school established in a hospital (usually called a hospital school), or under any arrangements made by the local authority under section 19 of the Education Act 1996 (normally provision in PRUs or services centrally managed by the local authority, where the child is being provided with such education by reason of a decision made by a medical practitioner).

In line 1.2.6 include expenditure on hospital education services only. It should include services made available to children and young people resident in the local authority's area,

and services made available to those who are in the area because that is where they are receiving their health care. It should also include expenditure on the local authority's pupils who are receiving their education from an independent hospital education provider.

It is important to exclude from this budget line any funding for hospital education places in special schools (including those special schools that are hospital schools) or PRUs (sometimes these are known as medical PRUs), which should instead be included in line 1.0.2 with a breakdown in the 'High Needs Places Table'.

### **Other alternative provision services**

Include planned expenditure on AP services provided directly or commissioned by the local authority. This may include funding for home educating parents.

Also include funding for AP providers other than PRUs, AP academies and AP free schools. Include funding for commissioned services delivered by PRUs, AP academies and AP free schools.

Exclude any funding for high needs places at PRUs and AP academies (which should be included in line 1.0.2 instead and, in the case of PRUs, specified in table 2) and any top-up funding in respect of pupils at these providers (see lines 1.2.1 and 1.2.2).

Any funding for places in AP free schools that is recouped from local authorities from the third year that the free school is open should be included in this line, with the same amount included in the academies recoupment line 1.10.2.

### **Support for inclusion**

Include here expenditure for:

- collaboration between mainstream and special schools and primary and secondary schools to enable children with SEN to take part in mainstream activities
- devolved expenditure for the integration of children from specialist to mainstream settings and the provision of discrete services or projects to promote such integration, such as commissioned outreach services

Do not include recharges or the cost of assessing the need for and monitoring SEN provision. This should be included in the 'Other Education and Community Budget', line 2.1.2, under 'Monitoring of SEN provision'.

### **Special schools and PRUs in financial difficulty**

Include expenditure on assisting local authority maintained special schools and PRUs in financial difficulty.

### **Private finance initiative (PFI)/Building Schools for Future (BSF) costs at special schools, AP/PRUs and post-16 institutions only**

Include expenditure on funding private finance initiative (PFI) or Building Schools for the Future (BSF) costs at special schools, special academies, PRUs and AP academies, where the local authority has decided to fund this outside the place funding and top-up funding. This line should also be used for funding PFI or BSF costs at maintained 16 to 19 institutions and 16 to 19 academies, which can no longer be funded through the schools formula as the post-16 factor has been discontinued.

### **Direct payments (SEN and disability)**

Include all expenditure planned by the local authority under [The Special Educational Needs \(Personal Budgets\) Regulations 2014](#) to provide a direct payment to the parents of children, or to young people, with an EHC plan.

Include here SEN transport expenditure where there have been direct payments made to families to cover these costs.

### **Carbon reduction commitment allowances (PRUs)**

This code is no longer in use.

### **Therapies and other health related services**

Include costs associated with the provision or purchase of speech, physiotherapy and occupational therapies. Include any expenditure on the provision of special medical support for individual pupils which has been deemed to be special educational provision (for example, recorded under section F of an EHC plan) and therefore the responsibility of the local authority.

## Appendix 2

### Analysis of High needs DSG budget by area of spend

Special schools	13,399,336
Top ups	11,055,233
Resource Provision	1,091,543
TWAPA	1,601,467
Additional alternative provisions	1,012,024
Speech & Language therapy (SALT)	225,175
Disabled childrens team	136,178
Specialist Inclusion	3,200,000
EHC support	2,840,000
Medical needs team	300,635
Special extra district	16,500,000
Central overheads, management & other staff costs	544,656
Senif / Early years high needs DSG	1,150,000
Post 18 development officer	50,000
<b>Total budget requirement</b>	<b>53,106,247</b>
2025/26 High needs DSG	36,310,431
Block transfer from schools to High needs	1,012,024
<b>Total funding available</b>	<b>37,322,455</b>
<b>Forecast overspend for 2025/26</b>	<b>15,783,792</b>

# **Schools Forum**

## **Work Programme 2024/25**

Prepared by

Jemima Flintoff, AD Education and Inclusion

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

Forward Plan	
Sufficiency Audit	Jemima Flintoff - July

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	
	Education Function for Maintained Schools - Governor Support funding request	Debby Simpson Martyn Sharples	Decision	

Meeting date	Reports	Officer	Report for:	Deadline for papers
<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	
	Update on School Funding Formula	Jane Davy	Information	
	Update on Maintained School Balance	Jane Davy	Information	



Meeting date	Reports	Officer	Report for:	Deadline for papers
<b>Monday 24<sup>th</sup> February (Exception Meeting)</b>	High Needs Block Funding 2025-26	Steve Drake Emma Ingham Jane Davy	Information	<b>Monday 10<sup>th</sup> February</b>
<b>Thursday 24<sup>th</sup> April 2025</b>	Cluster Paper	Connie Beirne	Information	
	Update on Schools Rebuilding Programme (Capital Projects on Special Schools) to include Three Ways and Delta	Richard Morse	Information	
	Central services to schools block contingency - options paper	Jemima Flintoff Connie Beirne Steve Drake		