

Schools Forum Meeting

Date: 24 April 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/a-z/schools-forum>

Members of the Forum

Primary Heads Maintained x 2

Mungo Sheppard (Ash Green Primary School)

Vacant

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)
Academy Bursar x2	Ivan Kuzio (Trinity MAT)
	Adam McNichol (Hebden Royd)
Academy Bursar Substitute	David Sheard (Trinity MAT)
Roman Catholic	Brenda Monteith (Highbury School)
Church of England	Vacant
Calderdale Federation of Education Staff Unions	Hamish Heald (National Education Union)
Post 16 Representative	Karl Veltman (Calderdale College)
Early Years Representative x2	Denise Gwizdak (Pye Nest Day Nursery)
	Andrea Dyson (Tot Spot Day Nursery)
Cllr Adam Wilkinson, Cabinet Member for Children's Social Care and Lead Member for Children's Services. (Observer status only)	

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 24 February 2025**
5. Election of Cahir and Vice Chair
Verbal/decision **Karen Morley**
6. Schools Forum Membership, Principles and Terms of Reference
Verbal Consultation/decision **Karen Morley**
7. Impact of allocation of funding School Improvement School Clusters (24/25)
Information **Connie Beirne**
8. School Rebuilding Programme, School Capital Funding and Free School Update
Update/information **Richard Morse**
9. High Needs Block Funding and Expenditure - DSG Management plan review April 2025
Update/information **Emma Ingham**
10. School Balances – Spring Monitoring for Maintained and Academy Schools
Update/information **Jane Davy**
11. **Any Other Business** **Chair**
Questions to be submitted a **minimum** 3 days prior to the meeting in writing to:
CalderdaleSchoolsForum@calderdale.gov.uk
Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair.
12. **Future Dates** **Jemima Flintoff**

3 July 2025
23 October 2025
15 January 2026
30 April 2026
2 July 2026

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

CALDERDALE SCHOOLS FORUM
24 February 2025 – Virtual Meeting Via Teams

PRESENT:

Karen Morley (Academy) – Co Vice Chair
Mungo Sheppard (Primary Maintained)
John Eccleston (Academy Primary Governor)
Stuart Hillary (Academy Secondary)
Karl Veltman (Post 16 Representative)
Gareth Morris (Primary Governors Maintained)
Louise Downing (Primary Governors Maintained)
Adam McNichol (Academy Bursar)
Rachel Harling (Academy Secondary)
Hamish Heald (Union Representative)
Kevin Rivett (Unions Representative)
Stephen Baines (Academy Secondary)
Phil Hannah (Academy AP)
Ivan Kuzio (Academy Bursar)
Debbie Sweet (Special School)

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 (Head of Legal and Democratic Services)
Jane Davy (Finance Manager)
Victoria Coyle (Interim Head of SEND)
Steve Drake (Finance Manager)
Amanda Farron (Senior Finance Officer - observing)

APOLOGIES

Brenda Monteith (Roman Catholic Diocese Rep)
Denise Gwizdak (Early Years Rep)
Andrea Dyson (Early Years Rep)
Dan Burns (Academy Primary)
Richard Horsfield (Academy Secondary)

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 & Phil Hannah part of the funding.

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

4. Minutes of the Schools Forum held on 16 January 2025

Page 7 – To amend the information Jane gave around Schools Causing Concern meetings for better reading.

5. High Needs Block Funding 2025/26

Steve apologised to Forum Members as the figures on the report have updated since it was submitted for distribution. He will amend the report for the distribution of the minutes and for the Schools Forum website. The special schools allocation shown in 2d) was understated by £1,322,577 and should have been £14,721,913. This figure is also reflected in Appendix 2 & means that the forecast in year overspend is £17,106,369"

Debbie Q: How many children are educated in special extra district? What is the analysis of needs?

There were 121 children in independent in 2023 and in February 2025, this increased to 216. The main need identified for children in independent schools is Social Emotional Mental Health (SEMH). There is constant decision making to find the best solution. SEN officers complete the case work and there is also a resourcing panel which Jemima signs off.

Debbie Q: In February 2025 there were 216 placed in independent settings, how does this compare to those in maintained special schools? Is it common that once a child is placed for SEMH, that is their only option?

It is a lot less and is around 40% of the special schools' intake. The resource panel has focused on phased transfer to independent schools and a lot have been rejected this time and we are using exceptional funding requests and the development of ARPs to ensure

children can stay in mainstream wherever possible. Officers were asked more questions prior to the meeting from Debby Sweet and they will respond to her directly.

Phil Q: What is the value for money per child? We want to help support and offer places. How well do we measure progress of those in independent schools and their expected outcomes?

Costs are high for independent school places, but we currently do not have enough state funded specialist places, and we do see positive outcomes for children in those schools. If we can progress the Special Free School bid with the DFE, many of these children could have had their needs met within a state funded school.

Rachel Q: How confident are we that capital plans will meet need? Or will we find ourselves building a school but then needing another school, due to children outweighing the current predictions?

The work to ensure we have the sufficient specialist places includes transformation in mainstream schools. The work to support mainstream inclusion is key. We are focusing our energy into supporting provisions to help children remain local and plans will need to work at pace. Local authorities around the country are seeing the same issues. A new free school will be likely to take 3 years to open so mainstream inclusion is a key focus for us.

Adam Q: We have an overspend of £17 million, where is the money coming from to cover the overspend? The allocation being proposed, is this enough to be sustainable for financial years going forward? What is being done to address the longer-term need?

The High Needs Deficit group are focusing on how to turn the deficit around. We are potentially facing a cumulative deficit of £17m currently due to previous years deficits. The potential end to the government's statutory override for High Needs deficits threatens many councils. The LA expected the Government to instruct us to capitalise the deficit and ultimately reduce this over the years. By spending less on the independent sector, this will allow more funds to go to our mainstream and special schools, training for staff, SEND high needs bandings and expanding provision through the exceptional funding requests. We are working on a sufficiency analysis which breaks down the primary and secondary needs of children, types of provisions we have, primary and secondary needs and the costs. The sufficiency information will be published in summer and brought to Schools Forum for information. The sufficiency work will support us to plan and open new provision based on better data intelligence.

John Q: Are we meeting the need of children in special schools who are not SEMH in the system?

There are children in mainstream schools who have SEMH which is a wide area of need. Not having a SEMH school creates a more expensive pathway. We have children with higher needs who need a smaller setting, and who are attending expensive independent schools. Because we have a range of independent special schools in the area, fewer children are

educated out of area that many other LA's, but we do have an increasing number accessing independent placements.

John Q: Have we got a timescale for this plan that will set us on the road to recovery? We have confidence in the Mainstream Inclusion Calderdale framework being launched at the end of the year to help us support more children to remain in local schools. The development of our ARPs and Tier 1 and 2 AP is supporting children to stay in mainstream schools. Last year, we had 57 young people whose request was not fulfilled to go to a specialist school but this year the number was 15.

Karl Q: What processes do specialist, and private providers go through for setting the price per pupil? Can they set their own price? Will we be able to run ours for a much lower cost and is there any legislation where they need to cap the amount?

The White Rose framework sets its own price reviews. This set a 3.5% increase this year and there is work on going on how we commission places. Independent providers can set their own price as they are providing places that most local authorities cannot meet, due to rising demands.

Mungo commended we are in it together and need to upskill mainstream schools. It was discussed at the North Halifax cluster meeting how we can work together. Falling roles need to be taken into consideration. SEMH is a big factor in schools.

Debby added the price of places outside of LA provision is high, 4 years ago there was a promise to provide additional ADHD provision which was never met, the cost of that provision would have been £28-£32K per place which would have been lower than the provision provided outside of the LA provision. ARP (Alternative Resource Provision) is low.

Hamish voiced his concerns around the money being spent on the private and independent sectors. The staff in those schools' work with children with very challenging behaviour and have less rights than those teachers working in mainstream. He would support staff being able to be protected by the same rights. Private and independent schools also don't pay into the union's facilities pot.

Rachel Q: What are the biggest barriers and are they being addressed in terms of resources centrally for the LA to deliver? Are we investing now to reduce those barriers to allow the outcomes we want to be in place soon? If mainstream is key to this, should we be investing in ARPs now? Looking at the £17 million overspend, do we have a 3-year projection where that will be and from a DfE perspective?

In part, we know capital costs for building a special school is expensive and capital allocations are quite small, its calculated at £100,000 per child per place when building a new school. There is a process around opening new schools currently, whereby LAs must go through a free school bid with the DfE. If the free school is agreed, it is for academy chains

to bid to open and run the school. The bid and awarding process is time-consuming. We are trying to use our resource to make it stretch as far as we can for the ARPs and inclusion in mainstream schools. We meet monthly with DfE, and as funding was not in deficit until recently in Calderdale, we are not under DfE intervention over the High Needs deficit, which many LA's are. The government are clear that the system is not working well enough for children with SEND nationally and are conducting a curriculum review. Ofsted are reviewing their framework to consider more measures for inclusion when they judge school effectiveness.

The Chair asked if anyone has questions to shape the reports being brought to these meetings, this would be welcomed by officers.

John would like governors to be more aware of the information around the LA's financial situation and to be given more information at the CGA. Jemima is happy to attend meetings with governors on Teams or face to face

Action for John to arrange with Jemima. There are also Local Governing Board meetings which Debby can help arrange for Jemima and officers to attend.

18. Any Other Business

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

CalderdaleSchoolsForum@calderdale.gov.uk

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

19. Future Dates

24 April 2025

3 July 2025

All meetings will start at 4pm

Venue: virtual Teams Meeting

Report to Schools Forum

Item	6
Meeting Date	24 April 2025
Subject	Schools Forum Membership, Principles and Terms of Reference.
Report Author	Karen Morley

Report purpose

To propose an update to

1. The Schools Forum Membership
2. The Schools Forum Principles and Terms of Reference

Need for consideration

Schools Forum Memberships update to ensure it is representative, and Replacement of the Schools Forum Handbook with Schools Forum Principles and Terms of Reference.

Need for decision

Approve

1. Schools Forum Membership from 1st April 2025.
2. The Schools Forum Principles and Terms of Reference

Contact Officers

N/A

1. Background information and context

- a) The proposed Schools Forum membership is attached at Appendix 1
- b) Principles and Terms of Reference is attached at Appendix 2

2. Main issues for Schools Forum

- a) The present membership of school's forum is no longer representative of the number of pupils within Maintained and Academy schools within Calderdale MBC.
- b) The proposed membership considers the present numbers (based on October 2024 pupil census)
 - Primary Maintained (8980 pupils/26% of total Calderdale pupils)
 - Primary Academy (9162 pupils/26% of total Calderdale pupils)
 - Secondary Academy (16435 pupils/48% of total Calderdale pupils)
- c) The proposed membership remains as 24 members – with 18 school members and 6 non-school members.
- d) Places are retained for
 - I. A Special School Headteacher – schools' representative
 - II. A representative from Alternative Provision– schools' representative
 - III. 2 Early Years Representatives
 - IV. Catholic Church Representative
 - V. Church of England Representative
 - VI. Calderdale Federation on Education Staff Unions
 - VII. Post 16 Representative.
- e) The remaining 16 places are retained for a further 16 school Representatives
 - The allocation of places for the school representatives should be reviewed on a regular basis and at least annually.
 - The proprietor elects academy school forum members. Since many academies are part of multi-academy trusts, the proposal includes four trust representatives (which could include headteachers, senior staff (eg CFO) trustees /governors). There is no requirement for academy representatives to proportionally represent primary and secondary, but the proposal does take this into account.

The proposal includes:

2 Maintained Primary Headteachers

2 Maintained Primary governors
 2 Academy Primary Headteachers
 2 Academy Primary School Governors
 2 Academy Secondary Headteachers
 2 Academy Secondary School Governors
 4 Multi Academy Trust Representatives

Overall Representation

Maintained 25%

Academy 75%

Overall pupil numbers

Maintained 26%

Academy 73%

Special/AP 1%

- f) The proposal retains all existing school forum members until the end of the present term of office. If the proposal is approved there will be the following vacancies

Maintained Primary Headteacher	V
Academy Primary Headteacher	V
Academy Representative	V
Academy Representative	V
Church of England	V

- g) Substitutes – at present there are 2 named and approved substitutes listed – consideration is needed to identify additional named and approved substitutes.

- h) Succession Planning

Appendix 2 shows the proposed schools forum membership, the present school forum members, the school that they represent and when their term of office ends.

- i) Election of Chair and Vice Chair

The Chair and Vice Chair are elected at the start of the academic year, nominations will be required prior to the first meeting of the academic year to allow voting to take place.

3. Recommendations

- a) Comment on the proposed membership and agree amendments or the proposal as included at Appendix 1
- b) Approve the Schools Forum Principles and Terms of Reference as attached at Appendix 2 and request that it is included within the CMBC School Forum webpage
- c) Consider increasing the number of substitutes
- d) Note the Chair and Vice Chair requirements for the next academic year.

4. Reasons for recommendations

To update school's forum information and membership to ensure the smooth running of The Calderdale Schools Form ensuring that it is representative of the schools within Calderdale.

	Representation Type	Filled/Vacant	Category	Name	Term Complete	School or Establishment
1	Maintained Primary Headteacher	F	Maintained	Mungo Sheppard	31/08/2027	Ash Green Primary
2	Maintained Primary Headteacher	V	Maintained			
3	Maintained Primary governor	F	Maintained	Louise Downing	25/05/2027	Cross Lane
4	Maintained Primary governor	F	Maintained	Gareth Morris	25/05/2027	Ferney Lee
1	Academy Primary Headteacher	F	Academy PH	Dan Burns	31/08/2027	Old Earth
2	Academy Primary Headteacher	V	Academy PH			
3	Academy Primary School Governor	F	Academy PG	Karen Morley	24/01/2026	Scout Road
4	Academy Primary School Governor	F	Academy PG	John Eccleston	31/08/2027	Warley Road
5	Academy Secondary Headteacher	F	Academy SH	Stuart Hilary	25/05/2027	Park Lane
6	Academy Secondary Headteacher	F	Academy SH	Richard Horsfield	31/08/2027	Brighouse High
7	Academy Secondary School Governor	F	Academy SG	Stephen Baines	25/05/2027	Trinity Halifax
8	Academy Secondary School Governor	F	Academy PG	Rachel Harling	31/08/2027	TLT
9	Academy Representative	F	Academy REP	Adam McNicholl	27/06/2027	Hebden Royd
10	Academy Representative	F	Academy REP	Ivan Kuzio	03/06/2027	Trinity MAT
11	Academy Representative	V				
12	Academy Representative	V				
1	Special School Head Teacher	F	Special HT	Debbie Sweet	13/01/2027	Highbury
2	Academy Alternative Provision	F	Academy AP	Philip Hannah	01/01/2026	TWAPA
3	Early Years Rep	F	Early YR	Denise Gwizdak	20/09/2026	Pye Nest Day Nursery
4	Early Years Rep	F	Early YR	Andrea Dyson	20/09/2026	Tot Spot Day Nursery
5	Catholic Church	F	Catholic C	Brenda Monteith	31/08/2027	
6	Church of England	V	Church of E	Vacant		
7	Calderdale Federation of Education Staff Unions	F	Calderdale ESU	Hamish Heald	01/09/2027	NEU
8	Post 16 Representatives	F	Post 16 R	Karl Veltman	15/06/2026	Calderdale College
Substitutes						
	Maintained Primary Headteacher - Substitute			Alice Leadbitter		
	Academy Substitute			David Sheard		

Schools Forum Principles and Terms of Reference

Background, purpose and principles

The Calderdale Schools Forum is operated in accordance with the Department for Education and Skills (now DFE) 'Schools Forums (England) Regulations 2012' which lays down the statutory instruments in respect of the establishment of the forum, membership, and constitutional, procedural and administrative matters. The regulations were updated in 2020 to allow remote meetings to take place with a further update in 2021 allow for remote meetings to be permanent.

The purpose of the Calderdale Schools Forum is to provide unambiguous professional advice and strategic direction from forum members to education decision-makers regarding the funding of schools. The forum is a representative group of service providers who are required to use the variety of funding streams to ensure coherent educational provision for children and young people to maximise the positive impact of funding on the quality of teaching & learning and standards.

The Calderdale Schools Forum is based upon the operational good practice guidance documents which include the Operational Good Practice Guide, Schools Forum powers and responsibilities, Schools Forum structure and the Schools Forum self-assessment tool.

[Schools forum operational and good practice guide - GOV.UK](#)

Terms of reference

The Calderdale Schools Forum provides a formal channel of communication between Calderdale LA and schools (and other service providers) and serves as the principal mechanism for consultation and decision-making relating to the funding of schools.

The Forum consults on any proposed changes to the school funding formula, and specifically any changes in relation to the factors and criteria, methods, principles and rules used to calculate schools' budgets and the financial effects of any proposed changes.

The Forum acts as a consultative body on issues relating to:

- Changes to the local funding formula

- Proposed changes to the operation of the minimum funding guarantee
- Changes to new contracts affecting schools
- Arrangements for the education of pupils with special educational needs, in pupil referral units and in early years provision.

The Forum is responsible for decisions on:

- The amount of funding to be centrally retained within the Dedicated Schools Grant
- Proposed carry forward of deficits on central spend from one year to the next
- Proposals for de-delegation of funding from maintained primary and secondary schools
- Changes to the scheme of financial management

Membership

There is no maximum or minimum size of a Schools Forum. However, the Calderdale Schools Forum will be kept to a reasonable size to ensure that it does not become too unwieldy. The membership shall be divided into school and non-school members, ensuring fair representation across all phases including early learning providers, special schools and the Pupil Referral Units, and including representation from Academies.

The non-school members will constitute a maximum of one-third of the total membership of the Forum to represent PVI providers of early learning and childcare, teaching unions, the Catholic Church, The Church of England Church and Post 16 providers.

The school members, who are drawn from headteachers/principals, governors and academy representatives, must number at least two-thirds of the total membership of the Schools Forum. The balance between maintained primary and secondary and academies must be broadly proportionate to the pupils in each category (confirmed by an annual review of pupil numbers). There is no requirement for academies members to represent specific primary and secondary phases, representation in this category will remain broadly proportionate to overall pupil numbers in all schools but consideration will be given to appropriate primary and secondary academy representation. Of the total number of places available on

the Forum for school members there shall be one representative for special schools and one representative of the pupil referral unit.

Calderdale Council elected members, including the Portfolio Holder for Children and Young People, are invited to attend meetings but may not be appointed as a member of the Forum. Other interested parties may be invited to attend meetings. A representative from the DFE (previously Education Skills and Funding Agency (ESFA)) may attend as an observer and participate in discussions to support the local process and provide a national perspective.

The Local Authority is represented by an officer nominated by the Director of Children and Young People's Service and by the Chief Finance Officer. Additional officers attend, as invited, to contribute to discussion or set agenda items. A further section "Right to Attend" is added below.

The composition and membership of the Calderdale Schools Forum is available online on the Calderdale Council Schools Forum website. All representatives or nominatives shall be appointed as members for an initial term of three years, which may subsequently be reviewed through re-election or re-nomination in a subsequent process.

Members who will be unable to attend a meeting will be required to give apologies to the clerk prior to the meeting. Any member who does not attend two subsequent meetings and does not have apologies accepted will be required to stand down and a replacement member will be elected. A member shall vacate membership of the forum if they cease to be a member of the constituent group that they represent.

Officers employed by the LA who have a role in the strategic resource management of the LA are barred as a school forum member.

Trust boards (or governing bodies) of academies will be responsible for the election of academy representatives, other groups will be responsible for the method they adopt to select their representatives.

Election of Members

The election of Schools Forum members must be undertaken in a fair and transparent process, for academies this is the role of the proprietor, for maintained schools this is a task undertaken by Governor Support.

For academies this task will be undertaken by Governor Support subject to agreement by Schools Forum.

The third category for academies (Academy Representatives) will be selected from academy CFO's (or equivalent) in the first instance, if no nominations are received the Governor Support will open this up to other positions within the academies. If insufficient academy heads or governors/trustees are nominated the positions will be open to other academy representatives.

Nolan Principles

Forum members will adhere to the Nolan Principles

The Seven Principles of Public Life (also known as the Nolan Principles) apply to anyone who works as a public officeholder. This includes all those who are elected or appointed to public office, nationally and locally, and all people appointed to work in the Civil Service, local government, the police, courts and probation services, non-departmental public bodies (NDPBs), and in the health, education, social and care services. All public officeholders are both servants of the public and stewards of public resources. The principles also apply to all those in other sectors delivering public services.

1. Selflessness

Holders of public office should act solely in terms of the public interest.

2. Integrity

Holders of public office must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships.

3. Objectivity

Holders of public office must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias.

4. Accountability

Holders of public office are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.

5. Openness

Holders of public office should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing.

6. Honesty

Holders of public office should be truthful.

7. Leadership

Holders of public office should exhibit these principles in their own behaviour and treat others with respect. They should actively promote and robustly support the principles and challenge poor behaviour wherever it occurs.

Administration

The clerk to Schools Forum will record the terms of office of school forum members and assist in the selection of school forum members.

Forum meeting papers (current and past) are available online at

[Calderdale Schools Forum web page](#)

Agendas and minutes are available 5 working days before each public meeting and circulated to all members electronically.

Papers

Recommendations in reports should identify whether the forum is deciding, recommending, advising or expressing a view. This should also be indicated on the agenda, using the codes identified below.

Decision (D)

Information (I)

Consultation (C)

Timing and frequency of meetings

- Public meetings of the Forum will take place on at least four occasions per year. However, the volume of business or exceptional needs may require meetings to take place more frequently. The dates, times and Venues of public meetings are published on the Schools Forum webpage.
- All meetings will be open to the press and public.

Special Meetings

- A special meeting may be called for during a meeting if a simple majority of those in attendance agree.
- A special meeting may be called by writing to the clerk to the forum. The letter must be signed by at least 1/3 of the forum membership (i.e. six or more people)

Urgent Items

If there are urgent items of business and a meeting of the Forum is not imminent the Chair, in consultation with the Vice Chair, shall e-mail members to seek the necessary approval.

If any member does not wish to make a decision in this way a special meeting be arranged.

Quorum

- For Schools Forum to be quorate, 40% of members must be present. Inquorate meetings may proceed, but any key decisions may be deferred to a future meeting to ensure full representation of views.

Substitution

- Members of the Forum may nominate appropriate substitutes to attend meetings in their place if they are unable to attend themselves. Named substitutes will be agreed by school forum.
- Substitutions for school representatives can only be by the same constituent group.

- Named substitutes have the same rights of the full member whilst they attend the meeting in place of the full member.
- Any substitutes provided by a member who was not previously named and approved by Schools Forum will not be allowed to participate as a substitute member unless invited to participate by other forum members.
- Members who are unable to attend a forum meeting should contact the clerk. A named substitute should be notified to the clerk in advance of the meeting.

Voting

- The decisions and recommendations required of the Calderdale Schools Forum will be agreed at the start of discussion. On items relating to funding formulae, only schools, academy and PVI setting members can vote.
- The Forum aims to arrive at such decisions and recommendations by actively building a consensus around a proposed course of action. Details of situations requiring a vote and voting procedures can be found in the protocols.

Declarations of interest

- A member with a personal interest should disclose that interest at the start of the meeting or at any point during the meeting when the interest becomes apparent.
- Schools Forum members should, for reasons of probity, be aware of circumstances in which they should withdraw from meetings due to a conflict of personal interest. (A member with personal interest has a prejudicial interest if it is likely to prejudice the members judgement of the public interest).

Right to Attendance

The following individuals may speak at forum meetings:

- (a) The Director of Children and Young People's Services of the authority, or their representative.

- (b) The Finance Officer of the authority, or their representative.
 - (c) Any elected member of the authority who has primary responsibility for Children's Services or education in the authority
 - (d) Any elected member of the authority who has primary responsibility for the resources of the authority.
 - (e) Any person who is invited by the Forum to attend to provide financial or technical advice to the Forum.
 - (f) An observer appointed by the Secretary of State.
- Any person presenting a paper or other item to the Forum that is on the agenda, but that person's right to speak shall be limited to matters related to the item that the person is presenting
 - Calderdale School Forum Public Meetings are open to all. The Forum may also invite, by agreement, individuals to attend a meeting to provide information or reports. Visitors should be asked to leave if confidential items are discussed, unless the Forum have asked them to take part in a specific discussion.

Arrangements for election of Chair and Vice Chair

- The Forum shall elect a chair and vice chair by a majority of votes cast on an annual basis at the first meeting in the academic year. The term of office of the chair will run until the first meeting in the following academic year.
- In the absence of the chair and vice chair members should elect a chair for that meeting.
- In the event of a vacancy of the chair and vice chair a chair and vice chair should be appointed for the remainder of the academic year.

Subgroups/working groups

- The Calderdale Schools Forum may establish subgroups and/or working groups on an ad hoc basis for the consideration of specific matters as it deems necessary and shall decide upon the terms of reference for such

groups and on additional individuals to invite as deemed necessary. The Forum shall consider the work of such subgroups or Working Groups and shall make decisions or recommendations to the LA as appropriate.

Calderdale Schools Forum budget/members' expenses

The Local Authority will pay travel expenses, loss of earnings and childcare costs incurred by members in attending meetings of the Forum.

Arrangements for review and revision

The Principles and Terms of Reference are reviewed annually at the start of the new academic year, or more frequently if required.

Report to Schools Forum

Item	7
Meeting Date	24 April 2025
Subject	Impact of allocation of funding School Improvement School Clusters (24/25)
Report Author	Connie Beirne

Report purpose

To provide members of Schools Forum with a summary of the impact of funding allocated to each Cluster via the agreed annual formula as well as the additional award of funding in June 2024.

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

Need for consideration

The effective use of Central Schools Block funding in securing school improvement via our school clusters; for academies and maintained schools.

Need for decision

This report is for information about the impact of the funding delegated to clusters to support sector led improvement.

Information is provided to support decision making by Schools Forum about future funding for the self-improving school cluster model in Calderdale.

Contact Officers

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1. Background information and context

- a) The Calderdale Partnership School Improvement Board (CPSIB) working with Local Authority officers oversees the allocation of funding to school clusters and holds them accountable in terms of the impact evidenced in meeting each clusters priorities laid down at the start of the academic year.
- b) The Board is made up with representation of each Lead Cluster Headteacher and meets four times per year. The purpose of each meeting is for each cluster to be able to share good practice, identify the strengths and challenges of the work being undertaken and the impact evidenced.
- c) A full breakdown of funding allocations is provided in **Appendix 1**.
- d) Each cluster is asked to include and refer to the Local Authority Priorities identified each year. For 24/25, these are:
 - To reduce the inequalities that exist and ensure that every child/young person in Calderdale is successful, demonstrating fully their talents and being well prepared for their future stages of education and employment.
 - To ensure that all our young people and workforce have their emotional, social and wellbeing needs met, are resilient and live an enjoyable and fulfilling life.
 - To address the ongoing local recruitment and retention crisis, exacerbated by the pandemic from initial Teacher Training through to Executive Leaders.
- e) We also work to our Calderdale School Improvement Strategy 2024/25 which is our Protocol for Monitoring, Challenge, Support and Intervention in Schools.
- f) All clusters this year, have chosen to focus upon addressing the needs of our children with SEND. This is a real need in our schools with the increasing number of children arriving at our schools with complex needs. This work involves staff training, audits, resources etc.
- g) Use of this funding enables clusters to be professionally led by a cluster officer (remunerated through cluster funding) as well as the cluster Lead Headteacher. As a result, the improvement plans are sharply focused on clusters to ensure that local priorities are addressed, linked to the LA priorities and each school's development plan. However, Sowerby Bridge cluster made the decision to allocate the work of the cluster officer to the lead headteacher this year, so that all funding could be used by the schools.

- h) The Board made the decision in March 2023, that all funds would be distributed to each school cluster. However, this funding is restricted to Pre-16 pupils, in which case these funds are not available for Post 16 provision.

2. Main issues for Schools Forum

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

3. Recommendations

Schools Forum to continue to award annual funding to our school clusters. With contingency funding available, consideration of a further allocation of funds for borough wide/cluster wide projects.

4. Reasons for recommendations

- a) All our schools work collaboratively together within clusters to provide our children with the best educational outcomes. Funds are spent wisely and impact of this work can clearly be evidenced. (See 5g below)
- b) The work of clusters and the School Effectiveness Service has been vital in supporting schools to respond and continue to focus on the quality of education and the safeguarding, health and wellbeing of pupils and staff. It creates opportunities for leaders to be outward looking, to link and plan projects together, and to share best practice.
- c) Whilst the impact of funding allocation is evident through the excellent response of schools and the improvements already secured, further work is required to ensure children in Calderdale achieve at least as well as their peers nationally at all key points and are educated in schools that are at least Good.

5. Impact of funding, targets, and milestones

- a) Almost all schools engage well with the self-improving school cluster model and benefit from joint working and improvement work specific to the needs of the cluster. Consequently, this funding is having a measurable impact on outcomes for children and young people across the borough.
- b) All school clusters provide funding for their new Headteachers to attend the network, mentoring and coaching in place. This has been really successful both in terms of recruitment and retention alongside addressing Health and Wellbeing needs.
- c) Detailed below are some actions/evidence/impacts of the work going on within our school clusters. Full action plans and midyear cluster reports are available upon request from Carolyn.rooke@calderdale.gov.uk

Name of Cluster	Progress/Evidence of impact – March 2025
East Calderdale	<p>The SEND audit has led to rapid, direct improvements to the provision and strategies used to support our pupils with complex needs. This work has improved staff confidence and is contributing to the cluster feeling proud of the inclusivity demonstrated.</p> <p>Be-spoke training for all staff focused upon evidenced -based strategies to remove barriers to learning has been well attended with positive evaluations so far.</p> <p>All schools access 1 day funded support/plus other resources from an Education Psychologist leading to reduced suspensions and permanent exclusions.</p> <p>Continued focus upon raising attainment in writing with forecast pupil outcomes improving.</p> <p>Further development of a Diversity, Equality and inclusion plan (DEI) for all schools.</p> <p>New Headteachers attending network with positive feedback.</p>
North Halifax	<p>Shared good practice and systems set up across all cluster schools which is reducing suspensions and permanent exclusions, especially of those pupils with SEND. Three schools selected to develop ARP's and an effective pastoral network in place.</p>

	<p>With regard to EY, work around transition is going well with the EY network meetings half termly including representatives from public health and family hubs. Peer reviews have taken place around oracy in the EY as well as within SEND and have been well received and beneficial. SENCOs continue to work collaboratively to deliver training and there is now a focus upon upskilling all TAs.</p>
Calder Valley	<p>This cluster have focused upon one priority of addressing the needs of pupils with SEND. SENDCos, EY leaders, and Senior Leaders have all attended training and this is starting to embed and share good practice across all schools. Two schools have benefitted from a SEND/Behaviour audit delivered by the SPC. Headteachers successfully accessing coaching for their own health and wellbeing. The cluster are also working collaboratively with Woodbank Special School. Work continues to improve attendance and adopt an agreed approach across all schools.</p>
Elland	<p>Most schools on track for 100% of pupils with SEND and additional needs, to meet their targets which each school has identified for its pupils in their individual learning plans. (July 2025) Where schools are not on track, further interventions are in place. Strategies in place include working with the LA outreach team, Forest Schools, TIP training, all schools participating in CPD activities and work with the Educational Psychologist.</p> <p>The cluster are also working closely with their MHST teams and Family Hubs to expedite integrated working around an 'Early intervention' model. There is an investigation going on around Family Hubs 'surgeries model' as to how this can support schools better.</p> <p>Year 6 to Year 7 transition work remains strong within the cluster and there is a 'charter' being developed out of their draft Wellbeing Strategy as a more active approach to address MHWB across all schools. Activities include pupil/student shadowing, ambassador involvement, buddy programme, sports days and high school performance involvement open to all pupils.</p>
Todmorden	<p>Continued successful delivery, training and implementation of LINGO project with children, staff and their families. 31 children</p>

	<p>accessing LINGO across schools, with a focus upon those children in reception with developmental speech delays. Successful involvement of schools with Ogden Trust science project and Todmorden High School, including space camp. Science CPD for staff and a planetarium set up for year 5-7 to access and enjoy.</p> <p>The cluster continue to support a school that is requires improvement and due inspection in the summer term 2025. In terms of SEND, the cluster are engaged with Dingley's Promise with regard to training and support for EY pupils and their families. Woodbank Special School are also working with the cluster to provide SEND training and support.</p> <p>A hard-to-reach-families project has been successful in 2 cluster schools. Positive impact on improving the attendance of pupils with less than 90% attendance as well as reducing PA in both schools.</p>
Sowerby Bridge	<p>Development of a framework to support the teaching of oracy across all schools with two Evidence Champions involved. Training attended with Ripponden School leading this work and the impact of this will be reviewed in July 2025 but likely to continue into academic year 25/26. Opportunities are also available for staff to train as 'research champions' going forward. Transcription training accessed via Greetland Academy, has also been well attended and received, so schools can support one another.</p> <p>HT Wellbeing has formed a significant part of cluster work due to the demands of schools where challenges are difficult. The Primary Headteacher's WB conference came from this cluster and their Lead Headteacher, led the task group with the LA to deliver this successfully on the 7 February 2025, earlier this year. This work continues with all clusters having a representative on the task group, to develop and implement a 'HWB strategy for all Headteachers in Calderdale 2025-28.'</p> <p>The appointment of a Cluster Officer continues to be reviewed at each cluster meeting.</p>
Secondary	<p>Only two schools remain below Good in all areas with regard to Ofsted. It is hoped by July 2025, all schools will be good and outstanding in all areas. School to School support is being undertaken.</p> <p>Transition work led by WHS, shows the sharing of best practice and some improvement in attendance at schools for KS3 pupils.</p>

	<p>All schools continue to benefit from the expertise of an Educational Psychologist working with the most vulnerable/SEND pupils in their schools.</p> <p>Continued delivery of successful professional development programme for new senior leaders involving 8 schools. All subject networks run to collaborate and share good practice amongst subject leaders in all schools.</p> <p>School improvement triads delivering peer reviews have successfully taken place for three schools.</p>
<p>Special</p> <p>a)</p>	<p>Coaching for all Headteachers and senior staff remains in place as highly valued.</p> <p>With regards to core subjects and sharing of best practice, this has been established and evidence of impact has been seen in recent Ofsted inspections. A PSHE and Science group, have also been established this year. The Communications, Literacy and Language (CLL) lead group are focusing upon parental engagement and writing presently. Extended CPD opportunities have also been made available for staff.</p> <p>SPC, have also shared the proposal of setting up an awards event for our children who may struggle but eventually they are rewarded and achieve. A proposal has been passed onto JF as this would need to be funded via Schools Forum contingency funding.</p>

6. Resource implications

- a) The award of these funds have enabled clusters to continue longer term projects as well as develop and address new areas presented. It also opens up the opportunity for all schools to be involved, as sometimes, projects can only be funded for one or two schools at a time.
- b) Cluster officers also provide a full breakdown of their individual cluster's spending mid-year and at the end of the academic year.
- c) The funding for the self-improving school cluster model is having a positive impact on improving outcomes for children across Calderdale.

7. Appendices

Appendix 1

Calderdale Partnership School Improvement Board Cluster Funding - Allocation 2024-25	March 2024	June 2024 (additional Funds awarded)
Calder Valley (Midgley)	£26,871	£3,525
East Calderdale (Savile Park)	£33,052	£10,010
Elland (Cross Lane)	£28,361	£4,975
North Halifax (Savile Park)	£36,335	£12,736
Secondary (The Whitley AP Academy)	£56,714	£32,571
Sowerby Bridge (Savile Park)	£27,790	£4,419
Todmorden (Walsden St Peter's)	£26,990	£3,641
Special Provision (William Henry Smith)	£29,404	£1,123
Total	£266,000	£73,000

Total all funding	£266,000	£73,000
Cluster Formula allocations plus additional funding up to 31 March 2025	£339,000	
Cluster Formula allocation 25/26; to be decided as to distribution by Board members this year by 22 April 2025. Decision made to ensure funding is distributed across all clusters as fairly as possible in meeting individual school needs.	£248,000	Decreased allocation of £91,000

Report to Schools Forum

Item	8
Meeting Date	24 April 2025
Subject	School Rebuilding Programme, School Capital Funding and Free School Update
Report Author	Richard Morse

Report purpose

To provide information to Schools Forum on the source and investment of Local Authority Capital funding targeted at ensuring sufficiency of school place provision and the maintenance of Community and Voluntary Aided Schools.

Need for consideration

For information

Need for decision

No decision required

Contact Officers

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1. Background information and context

- a) Each year the Department for Education (DFE) has a national allocation of funding to support the delivery of additional places (if required) and funding in order to maintain the schools estate. Some of this funding goes directly to schools, some to Local Authorities, some allocated to the central delivery of projects or schemes and finally some is made available for schools and Local Authorities to bid for. Other arrangements include Private Finance Initiative (PFI) contracts where funding goes (via LA's) to the PFI provider who has responsibility for the upkeep and maintenance of school buildings.

Capital Maintenance (Condition): the responsible body for the maintenance of school buildings varies dependant upon the category of school. DFE funding is allocated to the responsible bodies. For Academies this is either directly to the Academy or Multi-Academy Trust, for Voluntary Aided Schools, allocations are through the respective Diocesan Body, and for Community and Voluntary Controlled Schools through the Local Authority.

For Community and Voluntary Controlled Schools, a combination of School Revenue Funding, Devolved Formula Capital (DFC – each school receives an allocation annually) and Local Authority allocated funding is used to maintain school buildings. The responsibility is a shared responsibility between the individual school and the Authority.

Academies may also bid for CIF funding from the DFE. (Condition Improvement Funding). This avenue is not open to Local Authorities.

In 2020 the Local Authority commissioned condition survey reports on all of its school buildings (Asset Management Plans). These identified the need for significant capital investment into the school estate (in excess of £20m). DFE funding allocations have been so substantially short of what is required to allow these issues to be addressed, that much of the investment of late has been reactive to the most serious and pressing of condition issues. Issue if left unaddressed would pose potential health and safety risks (e.g. failing roofs).

The School Rebuilding Programme will address some of the most urgent need; those schools fortunate enough to be the subject of successful bids will be rebuilt or refurbished. It remains the responsibility of the Authority to invest whatever is required to keep such schools safe and operational until such time as they enter the programme.

- b) Basic Need (Sufficiency):** Basic Need funding is allocated based upon a Local Authority's need for additional places. This is a formula based allocation based upon the SCAP (school capacity assessment) return submitted each year by the Authority. Calderdale's return reflects the data published each year within the Planning of School Places document. The return contains data upon pupil numbers, current and projected, and detail of the current number of school places available within the Borough. Where a shortfall of provision exists then theoretically funding should follow to enable additional places to be created.

Until recently this funding was to cover all areas of additional need (including Special Needs provision) although the SCAP return contained no reference to special needs and allocations were not linked.

A separate funding stream is now in place High Needs Capital (HNC) and there are moves to link each Authority's allocation to the analysis of need versus available places going forward.

- c) High Needs Provision Capital Allocations (HNPCA):** HNPCA funding is aimed at the provision of new places and to improve existing SEN and AP provision.
- d) Local Authority Investment:** Calderdale Council agreed in February 2025 to inject £14.5m of investment into addressing some of the backlog of condition issues in Calderdale community schools as part of its broader capital investment strategy.

The first step in allocating this additional funding to schemes is to refresh the Asset Management Plans commissioned 5 years ago so that we can establish an up to date list of priorities. There will inevitably be some reactive works required where Health and Safety risks become evident for example, however this new funding allows us to plan work in a more strategic and proactive manner.

A priority list will be drawn up based upon the advice contained within the updated Asset Management Plans (these are commissioned from, and produced by multi-disciplinary consultants – i.e. building surveyors, mechanical and electrical consultants etc).

Officers will work through the determined list to remediate building issues in priority order and will take the opportunity to 'batch commission' work across schools where opportunity presents. For example, a scheme of roof

replacements where schools are within a reasonable proximity of one another might be one approach. This will maximise the amount of work that can be commissioned within the available budget.

- e) School Rebuilding Programme (SRP):** All categories of school may be considered for eligibility under the School Rebuilding Programme. For the most recent round, schools were selected through a bidding process. The SRP scheme targets the worst condition schools nationally and those that most closely align with the criteria published at application stage. Procurement and funding is delivered by the DFE with a collaborative model employed for the delivery of schemes at a local level. Officer locally facilitate progress working with planners, heritage officers, council legal teams, bio-diversity net gain officers, transport teams, flooding/environment officers, highways teams and land and property officers amongst others.

The programme is not entirely cost free for the LA – there may be elements of any rebuild that are not covered by the programme or land acquisition requirement which need to be funded locally.

Castle Hill School is the first Calderdale School in the programme – detailed designs have been commissioned and are complete. Work has commenced on the establishment of a temporary school located in Centre Vale Park - the school will decant into its temporary home over the summer holidays so that work can start on the demolition of the old school building.

Preparatory work has commenced on the next 6 Calderdale Schools in SRP. The DFE are appointing technical advisers and design teams, and it is hoped that start up meetings can be arranged with those schools very shortly (the first in a matter of weeks). It has been suggested that the schemes in the current window may be staggered in terms of start up meetings with two commencing imminently, two in the Summer and two in the Autumn of this year. We are waiting for the last stage of DFE internal approval processes to take place so that we can engage with schools and progress matters. The next six (in no order) are: Todmorden High School, Calder Learning Trust (both now academies), Cross Lane Primary, Walsden St Peters VC Primary, Shade Primary School and Brooksbank Academy.

Calderdale has assigned officer resource to the delivery of these projects.

- f) Free Schools:** All new schools fall under the Free School presumption route. There are rounds where proposers may bid for funding to open a free school and where successful these are centrally funded and procured – similar to the SRP delivery model. For other schools, proposers may fund the commission

of school buildings, but a competition must be undertaken through the DFE to establish who will run the provision.

In Calderdale there are two key developments in this area:

Delta AP Free School – Delta AP was a successful bid for Wave 3 Funding from the DFE and due to be delivered through the department’s delivery team in collaboration with Calderdale’s delivery team. A site has been selected subject to final checks and approvals and it is anticipated that the scheme will move forward as soon as the current DFE review of pipeline projects is complete.

Threeways – Special Free School – Officers are waiting for the DFE to engage and progress the Free School application/competition process. The need for such provision has been established in terms of an analysis of need, capital funding is in place (this is ringfenced as committed funding within our capital programme). Staffing resource has been allocated for the commission and delivery of this new build and officers are keen to engage technical advisers and engage with the local community over the development of this provision.

- g) Appendix A shows the current spend profile for the various capital streams (scheme specific finance is not shown due to market sensitivity issues). A list of recent, ongoing and pipeline capital projects is also shown.

2. Main issues for Schools Forum

- a) The area of particular interest for the forum will be the investment of capital into schemes that provide additional capacity in the Special and AP arena, reducing the reliance on high-cost independent or out of Authority placements that are creating huge financial strain predominantly although not exclusively on the High Needs Block. Other areas such as home to school transport also incur high costs where pupils need to be transported over large distances, too often out of authority.

3. Recommendations

There are no recommendations

4. Reasons for recommendations

No recommendations

5. Impact of funding, targets, and milestones

Effective planning and investment in capital terms will ensure that unnecessary revenue and associated costs can be avoided.

6. Resource implications

The delivery of an unprecedented level of capital schemes within an extremely short time frame is placing a great deal of strain upon those involved with delivery and it will be necessary to monitor and review the level of resource allocated to the delivery of these capital works.

7. Appendices

Current Funding Position

	Allocations £'s			
	2021/22	2022/23	2023/24	2024/25
Basic Need*	4,145,886	3,230,957	6,205,288	2,142,115
HNCPA*	551,746	3,422,213	2,214,506	607,365
Capital Maintenance	1,752,572	1,859,798	1,815,982	1,789,310
			Future Allocations £'s	
CMBC Capital Investment Strategy			14,500,000	

Spend £'s	
Committed	Uncommitted
24,600,000	2,060,438
3,130,000	3,310,602
Spend £'s	
Uncommitted	
14,500,000	

*Basic Need and HNCPA combined as all spend is currently on AP and Special

Current active and pipeline schemes

Project	Stage	Funding
Close Out		
R@SH Main school	Final account, snagging, defects, etc.	CM
Highbury Lower Edge	Final account, snagging, defects, etc.	BN & HNCPA
Withinfields Phase 1	Final account, snagging, defects, etc.	BN & HNCPA
Withinfields Phase 2	Final account, snagging, defects, etc.	BN & HNCPA
Ash Green Rebuild	Final account, snagging, defects, etc.	Other
Christchurch Pellon Re-roof & fencing	Final account, snagging, defects, etc.	CM
Ripponden J&I Kitchen	Final account, snagging, defects, etc.	CM
New Rd - Underground voids	Final account, snagging, defects, etc.	CM
Live		

Ravenscliffe@SH - Modulares	Live	BN & HNCPA
Withinfields Phase 2 - BNG Works	Live	BN & HNCPA
Carlton Mill AP	Live	BN & HNCPA
Cross Lane ARP	Live	BN & HNCPA
Ravenscliffe Re-roof	Live	CM
Ling Bob essential works to modular	Live	CM
Cross Lane essential roof & struct repairs	Live	CM
Calder LT - Double modular classroom	Live	CM
Bailiffe Bridge - Essential repairs & maintenance	Live	CM
Castle Hill Temps & New Build	Live	SRP
Withinfields Phase 3 - Modulares	Live	Other
Ravenscliffe @SH Expansion	Live	BN & HNCPA
Pipeline Imminent		
Delta AP	Pipeline	Free School
200 Place Special Through School	Pipeline	BN & HNCPA
Halifax Academy ARP	Pipeline	BN & HNCPA
AMP Re-surveys	Pipeline	CM
Asbestos Management Re-surveys	Pipeline	CM
Christchurch/Tuel Lane Amalgamation	Pipeline	CM
Shade Primary	Pipeline	SRP
Todmorden High	Pipeline	SRP
Calder LT	Pipeline	SRP
Cross Lane	Pipeline	SRP
Walsden Primary	Pipeline	SRP
Brooksbank	Pipeline	SRP
Pipeline 2027		
Riverside Junior	Pipeline	SRP
Central St Infants	Pipeline	SRP
Stubbings Infants	Pipeline	SRP
Woodhouse Primary	Pipeline	SRP

Report to Schools Forum

Item	9
Meeting Date	24 April 2025
Subject	High Needs Block Funding and Expenditure - DSG Management plan review April 2025
Report Author	Emma Ingham

Report purpose

To outline DSG High Needs Expenditure and inform members of steps taken to mitigate the rate of increase experienced in 2024/25 in the 25/26 financial year

Need for consideration

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

Need for decision

N/A

Contact Officers

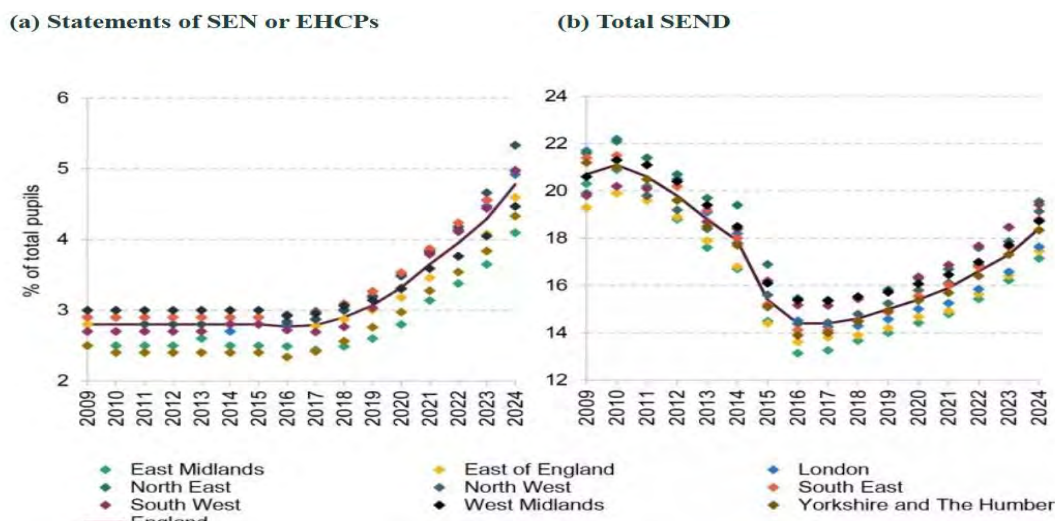
Emma Ingham emma.ingham@Calderdale.gov.uk
Steve Drake steve.drake@claderdale.gov.uk

1. Background information and context

Calderdale, like the majority of local authorities, is experiencing rising numbers of EHCPs and associated pressures on High Needs funding. This has resulted in overspend on the high needs block in the last two financial years., Nationally, there is predicted to be a £5bn overspend by the end of 2026 (Schools Week 2025).

The recent Institute of Fiscal Studies Report (December 2024) key findings with regard to the national context included:

- a) The number of school pupils with EHCPs has risen by 180,000 or 71% between 2018 and 2024.
- b) High needs spending has been consistently higher than funding by £200–800 million per year between 2018 and 2022,
- c) Nearly two-thirds of the increase in spending has been driven by increased spending on pupils in special schools,
- d) The government's own forecasts suggest annual spending on high needs will rise by at least £2–3 billion between 2024–25 and 2027–28 leading to cumulative local authority deficits of over £8billion by 2027



Currently, 55 local authorities (LAs) are subject to intervention through the DFE Delivering Better Value programme with a further 38 in the DFE Safety Valve arrangements. Unlike those local authorities, the overspend in Calderdale is not currently sufficient to trigger intervention by the Department for Education, however the current spend and trajectory are a significant concern and the LA meets with the ESFA regularly to review the local arrangements to mitigate cost pressures and review the High Needs Deficit Management Plan. It is a requirement of the plan to report progress against the steps being taken to progress addressing the overspend to schools forum.

To provide an overview, the table below sets out the current position for Calderdale in reference to the DSG High Needs funding.

Calderdale High Needs Expenditure 2023/24 – 2024/25

	2023-24 £,000s	2024-25 £,000s	2025-26 £,000s
Planned DSG position (surplus)/deficit	£6,123	£20,770	£38,650
	2023-24 £,000s	2024-25 £,000s	2025-26 £,000s
In year net position deficit / (surplus)			
Schools block	£0	£962,675	£1,012,024
Central schools services block	£0	£0	£0
Early years block	£0	£0	£0
High needs block	£5,255,391	£13,684,325	£16,867,375
Total net	£5,255,391	£14,647,000	£17,879,399

2. Main issues for Schools Forum

The high needs block has experienced an increased overspend of £8,428,742 between 2023/24 and 2024/25 meaning at cumulative overspend of £13,683,845

Whilst there is an expected overspend within the high needs block in 2025/26, the Local Authority have set an ambitious target to limit the increased overspend to £3.8M.

Factors affecting the increase in High Needs Expenditure

Significant Increase in Education Health and Care Plans

In 2024, the proportion of children with an EHCP in Calderdale went up to 0.4% above the national average of 4.8% to 5.2%. This increase not only impacts top-up costs for schools but also the creates pressure across the system, for schools' staffing and planning, for health and social care and statutory SEND supporting.

Jan	2024	2025	2026
Under 5	539	253	280
Age 5 to 10	790	1,090	1,218
Age 11 to 15	560	774	869
Age 16 to 19	386	418	460
Age 20 to 25	2	62	69
Total number by age group	2,277	2,597	2,896

*2026 are projected figures

Linked to that overall increase, there have been changes to the proportions if primary needs identified in children's plans.

Primary needs of children with an EHCP in Calderdale

Jan	2024	2025	2026
Autistic Spectrum Disorder	428	1,045	1,309
Hearing Impairment	36	77	90
Moderate Learning Difficulty	98	74	32
Multi- Sensory Impairment	27	22	22
Physical Disability	106	111	102
Profound & Multiple Learning Difficulty	27	77	90
Social, Emotional and Mental Health	246	446	473
Speech, Language and Communications needs	598	609	656
Severe Learning Difficulty	49	69	59
Specific Learning Difficulty	17	23	26
Visual Impairment	32	39	37
Total number of EHC plans by primary need	1,667	2,594	2,898

Specialist placements

Maintained specialist school placements have increased, albeit not in line with demand which is significantly higher.

Jan-23			Jan-24			Jan-25		
Highbury	Wood Bank	Ravenscliffe	Highbury	Wood Bank	Ravenscliffe	Highbury	Wood Bank	Ravenscliffe
101	111	235	130	121	242	143	139	250

In addition, there is still a significant number of children and young people being placed in independent specialist settings, with 216 children in 2024/25 compared to 169 in 2023/24. The predominant primary needs of the children and young people placed in specialist independent last year was SEMH (127) and Autism (54).

Whilst there will always be a need for some children to access places in specialist independent schools, the increase has in part been driven by sufficiency pressures on our maintained specialist schools. Calderdale will always need to use some places in our excellent independent specialist provisions (ISP) for those pupils whose needs cannot be met in mainstream or state funded specialist, but we do need to reduce the reliance on those places and increase capacity in the state funded sector, to ensure more children can attend their local schools.

What we have done/will do in 25/26

In 2025/26 the Specialist Inclusion Team will not increase in size but will continue to increase capacity by reducing non-statutory individual child level support and focus on workforce development in school and settings, and across the system. Plans are in place to reduce agency staff and appoint permanent specialists to improve assessment and identification of need in settings.

The Local Authority are continuing to expand resourced provision capacity in the borough. There is a SEND sufficiency report in development which is expected to be finalised in summer 2025 which will support the Local Authority in making decisions about location and SEND type for our resourced provisions in the future.

The Local Authority used part of the 0.5% Schools Block transfer in 24/25 to support mainstream settings with high numbers of children in reception and KS1 that require more specialist support than that ordinarily available and may have been placed in specialist settings in previous years. 6 provisions supporting approximately 40 pupils were supported in 2024. This is set to rise further in 25/26.

For the next Schools Forum, a more detailed report on Exceptional Funding Requests, the AP and ARP developments will be provided, as these are key elements in our local SEND & AP Strategy and in mitigating the high needs overspend.

Additionally, plans are in place to review top-up bandings for mainstream and specialist schools, but this will be a longer exercise as it will need modelling and consultation before proposals come back to Schools Forum for a decision.

3. Recommendations

Schools Forum is asked to note the content of the report

4 Reasons for recommendations

Contained in report

5 Impact of funding, targets, and milestones

Contained in report

6. Resource Implications

Contained in report

7. Appendices

[Spending on special educational needs in England: something has to change | Institute for Fiscal Studies](#)

[High needs funding: 2025 to 2026 operational guide - GOV.UK](#)

Report to Schools Forum

Item	10
Meeting Date	24 April 2025
Subject	School balances
Report Author	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 consider and give a view.

Need for decision

N/A

Contact Officers

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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 46 maintained schools (1 secondary, 42 primary and 3 special schools) and included such information as is available regarding 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 and adjusted for in year transfers) were £9.79 million: primary schools £5.74 million, secondary schools £1.02 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 £3.85 million, maintained secondary schools planned to increase their balances to £1.04 million, and special schools planned to reduce their balances to £1.87 million. This would give total planned balances of £6.76 million.
- c) The spring term monitor shows maintained primary schools are projecting to have balances at the end of the year of £5.62 million, maintained secondary schools are projecting surplus balances totalling £1.14 million and special schools are projecting £2.79 million. This would give total projected balances of £9.56 million at the end of March 2025. This equates to an increase on planned budgets of £2.8million
- d) At the June School Forum meeting it was agreed to suspend the balance control mechanism for 2024/25 and to adjust the calculation of the recommended thresholds to be a balance above 20% of all Income, this would bring maintained schools reporting in line with the ESFA requirements for academies.
- e) 13 Primary schools are forecasting to have lower balances than planned budget the remaining 29 primaries, secondaries and special schools are all

forecasting higher balances than planned budget. 3 primaries and 1 special school are projecting balances over 20% of total income.

- f) 1 Primary School is forecasting to be in deficit by 31 March 25 and 3 primary schools are projecting balances less than £20k. These schools will be closely monitored.
- g) Overall balances increased during 2023/24 it is likely school balances will remain around the same level as 2023/24 for 2024/25.
- h) A summary of schools' balances is shown in Appendix A
- l) At the February Schools Forum meeting, members asked for information on Academy balances, these are shown in appendix B and are as at 31st August 24, except the three schools that transferred to academy status in January 25, their balances are as at 31st December 2024.

3. Recommendations

- a) The current projections provided by schools are noted.
- b) A further update is provided for maintained schools in June 2025 based on final outturn

4. Reasons for recommendations

To enable Schools 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**
Appendix A

Calderdale Schools - Budget Monitoring 2024/25

School Name	Surplus bfwd	Budgeted Income	Original Budget 2024/25			Autumn Term Monitoring		Spring Term Monitoring	
	2024/25	2024/25	In-year deficit or surplus £	Original forecast	Year End Balances	Revised 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%	84,171	6.69%
Ash Green Primary School	156,417	3,554,933	-12,273	144,144	4.05%	219,120.00	5.45%	293,724	7.31%
Bailiffe Bridge J & I School	127,803	1,086,390	-58,617	69,186	6.37%	91,352.10	7.92%	146,133	12.28%
Barkisland CE (VA) Primary School	141,309	1,099,269	-27,757	113,552	10.33%	122,846.81	8.86%	117,029	8.29%
Carr Green J, I & N School	51,953	2,012,545	9,650	61,603	3.06%	59,371.00	2.93%	63,782	3.11%
Castle Hill J & I School	41,170	1,203,564	-40,582	588	0.05%	70.25	0.01%	-6,593	-0.53%
Central Street Infant & Nursery School	118,974	758,796	6,279	125,253	16.51%	96,366.96	11.11%	102,532	11.65%
Christ Church (Pellon) CE (VC) Primary School	-47,601	1,547,441	25,903	-21,698	-1.40%	19,356.37	1.17%	53,359	3.18%
Christ Church CE (VA) Junior School (Sowerby Bridge)	81,077	804,569	-39,752	41,325	5.14%	27,273.51	3.28%	23,462	2.75%
Cliffe Hill Community Primary School	32,325	1,667,702	-6,557	25,768	1.55%	3,500.50	0.21%	281	0.02%
Colden J & I School	18,102	626,014	7,945	26,047	4.16%	21,781.95	3.43%	29,263	4.58%
Copley Primary School	325,412	1,891,643	-78,146	247,266	13.07%	288,270.93	14.65%	365,557	18.41%
Cornholme J, I & N School	81,113	1,086,787	-73,249	7,864	0.72%	17,464.70	1.50%	83,298	6.93%
Cross Lane Primary & Nursery School	84,174	2,201,528	26,689	110,863	5.04%	119,313.14	5.33%	155,232	6.63%
Elland CE (VA) J, I & N School	353,113	1,262,242	-140,354	212,759	16.86%	235,090.93	18.14%	267,155	20.10%

Ferney Lee Primary School	129,481	1,548,403	-41,831	87,650	5.66%	112,246.49	7.02%	146,757	8.99%
Holywell Green Primary School	61,707	1,077,003	-22,083	39,624	3.68%	17,249.95	1.53%	650	0.06%
Ling Bob J, I & N School	205,933	1,699,141	-68,831	137,102	8.07%	223,250.00	9.12%	212,028	8.57%
Longroyde Junior School	57,603	2,471,010	9,104	66,707	2.70%	112,559.70	4.43%	106,894	4.20%
Midgley School	207,356	552,898	-62,886	144,470	26.13%	141,313.38	23.63%	0	0.00%
Moorside Community Primary School	153,461	1,992,750	-24	153,437	7.70%	144,698.30	7.20%	219,560	10.55%
New Road Primary School	224,278	1,251,284	49,459	273,737	21.88%	300,116.98	22.88%	342,456	25.36%
Norland CE (VC) J & I School	84,887	557,122	7,188	92,075	16.53%	73,760.45	13.31%	74,739	12.80%
Northowram Primary School	56,693	2,547,195	-53,219	3,474	0.14%	60,426.54	2.29%	105,582	3.94%
Old Town Primary School	712	611,284	265	977	0.16%	767.00	0.12%	0	0.00%
Parkinson Lane Community Primary School	999,387	3,497,966	-604,925	394,462	11.28%	403,100.00	11.24%	1,043,798	27.91%
Ripponden J & I School	155,913	1,167,660	-4,081	151,832	13.00%	95,964.00	7.67%	88,468	7.09%
Riverside Junior School	129,430	1,816,522	-21,117	108,313	5.96%	56,228.00	5.08%	60,602	5.39%
Salterhebble J & I School	45,284	1,297,992	-6,999	38,285	2.95%	21,314.38	1.61%	28,308	2.08%
Savile Park Primary School	130,404	2,860,008	-29,517	100,887	3.53%	0.00	0.00%	0	0.00%
Shade Primary School	33,005	1,120,947	-26,826	6,179	0.55%	36,585.31	3.04%	76,228	6.11%
Shelf J & I School	76,443	1,356,061	-36,717	39,726	2.93%	56,375.21	4.00%	81,689	5.74%
St Andrew's CE (VA) Infant School (Brighouse)	76,808	1,161,431	-50,778	26,030	2.24%	89,082.29	7.36%	74,989	6.05%
St Andrew's CE (VA) Junior School (Brighouse)	156,597	1,508,933	-80,452	76,145	5.05%	95,940.21	6.26%	103,672	6.51%
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%	74,364	11.43%
St Michael & All Angels CE Primary School	122,960	1,249,646	-51,453	71,507	5.72%	100,022.43	7.74%	117,375	8.74%
Stubbings Infant School	97,361	388,775	-30,206	67,155	17.27%	71,707.00	15.82%	73,970	16.24%
Todmorden CE (VA) J & I School	370,812	1,582,388	-148,354	222,458	14.06%	214,330.16	13.25%	278,758	15.42%
Triangle CE (VC) Primary School	89,733	1,153,706	-34,807	54,926	4.76%	32,895.92	2.87%	50,230	4.27%

Tuel Lane Infant School	48,095	610,265	-31,921	16,174	2.65%	-9,401.93	-1.52%	775	0.12%
Walsden St Peter's CE (VC) Primary School	172,853	1,040,983	-71,762	101,091	9.71%	105,948.20	9.77%	122,800	10.74%
Warley Town School	88,292	856,836	583	88,875	10.37%	83,473.71	9.24%	104,779	11.47%
Withinfields Primary School	135,307	2,349,283	-8,048	127,259	5.42%	69,096.05	2.89%	53,665	2.22%
Woodhouse Primary School	110,812	2,284,749	-43,964	66,848	2.93%	73,039.79	3.20%	201,452	8.44%
TOTAL PRIMARY SCHOOLS	5,951,471	64,270,226	-1,937,157	4,014,314	6.25%	4,245,853	6.64%	5,622,973	8.76%
					1		2		3

School Name	Surplus bfwd 2024/25	Budgeted Income 2024/25	Original Budget 2024/25			Autumn Term Monitoring		Spring Term Monitoring	
			In-year deficit or surplus £	Year end balances		Year end balances		Year end balances	
				£	%	£	%	£	%
SECONDARY SCHOOLS									
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%	1,142,507	16.76%
TOTAL SECONDARY SCHOOLS	2,131,632	16,356,537	87,712	2,219,344	13.57%	2,228,576	13.62%	1,142,507	16.76%
					0		0		0

School Name	Surplus bfwd 2024/25	Income 2024/25	Original Budget 2024/25			Autumn Term Monitoring		Spring Term Monitoring	
			In-year deficit or surplus £	Year end balances		Year end balances		Year end balances	
				£	%	£	%	£	%
SPECIAL SCHOOLS									
HIGHBURY SCHOOL	500,759	4,372,116	68,914	569,673	13.03%	572,320.00	13.09%	547,524	12.14%

RAVENSCLIFFE HIGH SCHOOL	1,101,237	6,708,244	-482,043	619,194	9.23%	774,463.00	11.54%	895,922	12.54%
WOODBANK SCHOOL	1,429,779	3,396,155	-750,794	678,985	19.99%	1,459,048.00	42.96%	1,351,219	36.40%
TOTAL SPECIAL SCHOOLS	3,031,775	14,476,515	- 1,163,923	1,867,852	12.90%	2,805,831	19.38%	2,794,665	8.79%
					0			1	1

TOTAL ALL SCHOOLS	11,114,879	95,103,278	- 3,013,368	8,101,511	8.52%	9,280,260	9.79%	9,560,145	11.07%
					1			3	4

Appendix B

School	As at 31/8/24	Notes
Abbey Park J, I & N School	pooled budget	trust has reserves of £13,532,000
Beech Hill J & I School	2,084,245	
Bolton Brow J, I & N School	105,403	
Bowling Green J & I School	-46,058	
Bradshaw Primary School	30,247	
Brighthouse High School	70,000	
Burnley Road J, I & N School	285,978	
Calder Learning Trust	1,110,518	as at 31/12/24
Dean Field Community Primary School	594,628	
Field Lane Primary School	not known	
Hebden Royd CE (VA) Primary School	55,905	
Heptonstall J, I & N School	-24,154	
Holy Trinity CE (VA) J & I School	193,466	
Lee Mount Primary School	221,000	
Lightcliffe Academy	254,000	
Lightcliffe CE VA J & I School	0	
Luddenden C of E	47,516	
Luddendenfoot J & I School	not available	
Midgley School	207,356	As at 31/12/24
Mount Pellon J & I School	pooled budget	trust has reserves of £13,532,000
North Halifax Grammar School	538,000	
Old Earth Primary School	322,180	
Old Town Primary School	710	As at 31/12/24
Park Lane Learning Trust	pooled budget	trust has reserves of £5,870,000
Rastrick High School	not on website	
Ryburn Valley High School	1,529,022	
Sacred Heart Catholic Primary School	157,000	
Salterhebble J & I School	45,287	
Salterlee Primary School	not available	

Scout Road Primary School	68,026	
Siddal Primary School	not available	
St Andrews C of E (VA) Junior School	156,598	
St Andrews CE (VA) Infant School	76,806	
St Marys CE (VC) J & I School, Sowerby Bridge	78,821	
St Patricks Catholic Primary School, Elland	-17,000	
The Brooksbank School	1,630,439	
The Crossley Heath School	2,030,616	
The Greetland Academy	173,348	
The Halifax Academy	124,000	
The Whitley AP Academy	781,000	
Trinity Academy Ackroyden	182,000	
Trinity Academy Halifax	355,000	
Trinity Academy St Peters	-31,000	
Trinity Grammar	609,000	
Wainstalls School	not published	
Warley Road Primary School	359,000	
West Vale Primary School	194,092	
Whitehill Primary School	-119,000	
	14,433,995	
Central Funds Held By MATs		
Abbey Trust	2,265,000	
Blessed Peter Snow	734,000	
Greater Heights Trust	604,783	
Impact Mat	-1,394,000	
Learning Accord	85,988	
Northern Education Trust	13,532,000	
Polaris Mat	not available	
South Pennine Trust	5,870,000	
Together Learning	472,544	
Trinity Mat	209,000	

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
High Needs Block 2025-26	July
Pupil Places	July
Pupil Funding following permanent exclusions	July
Activity paper for HNB every 6 months	

Meeting date	Reports	Officer	Report for:	Deadline for papers
Meeting Thursday 14th November 2024	Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	Wednesday 30th October 2024
	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
Meeting Thursday 16th January 2025	Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	Monday 6th January 2025
	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"> Financial Forecast 2024/25 & 2025/26 Actions to date How is Basic Needs Funding and High Needs Capital Fund supporting the High Needs deficit Recovery Plan? Feedback of the 0.5% 	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
Monday 24th February (Exception Meeting)	High Needs Block Funding 2025-26	Steve Drake Emma Ingham Jane Davy	Information	Monday 10th February
Thursday 24th April 2025	Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	Monday 7th April
	Schools Forum Membership, Principles and Terms of Reference	Karen Morley / Ian Hughes	Verbal Consultation / Decision	
	Cluster Paper	Connie Beirne	Information	
	Update on Schools Rebuilding Programme and Capital Projects on Special Schools (to include Three Ways and Delta and new builds)	Richard Morse	Information	
	High Needs Block Funding 2025-26	Emma Ingham Steve Drake	Update	
	School balances – Spring monitoring for Maintained / academy schools	Jane Davy	Information	
Thursday 3rd July 2025	Central Services to Schools Block (CSB) contingency - options paper	Jemima Flintoff Connie Beirne Steve Drake	Decision	