

Schools Forum Meeting

Date: 3 July 2025

Time: 4.00pm

Venue: Virtual Teams Meeting

Reports

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

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

Members of the Forum

Primary Heads Maintained x 2

Mungo Sheppard (Ash Green Primary School)

Duncan Hetherington (Castle Hill 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 8

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 April 2025**

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| 5. Exclusions Funding Clawback
Decision | Dafydd Cherry |
| 6. Central Services to Schools Block (CSB) contingency - options paper
Decision | Karen Hackett
Jemima Flintoff |
| 7. Maintained Schools Outturn as at 31 st March 2025 and Three Year Budget Plans
Decision/information | Jane Davy |
| 8. High Needs Block 2025-26 Monitoring Including Activity
Information | Emma Ingham |
| 9. Sufficiency Audit
Verbal/information | Jemima Flintoff |
| 10. Any Other Business | Chair |

A brief discussion on the budget cuts in education, the impact of the unfunded element of the teachers pay award and how we wish to address these issues and work together with school leaders to achieve better funding for education. I'd like to draw attention to the website <https://schoolcuts.org.uk/> that has been relaunched recently with up to date data.

Hamish Heald

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.

11. Future Dates

Jemima Flintoff

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 April 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)
Louise Downing (Primary Governors Maintained)
Rachel Harling (Academy Secondary)
Hamish Heald (Union Representative)
Stephen Baines (Academy Secondary)
Phil Hannah (Academy AP)
Debbie Sweet (Special School)
Brenda Monteith (Roman Catholic Diocese Rep)

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)
Jane Davy (Finance Manager)
Steve Drake (Finance Manager)
Amanda Farron (Senior Finance Officer - observing)

APOLOGIES

Dan Burns (Academy Primary)
Adam McNichol (Academy Bursar)
Corinne Kielty (Finance Officer)
Richard Horsfield (Academy Secondary) – tentative
Ian Hughes (Head of Legal and Democratic Services)
Richard Morse (School Organisation & Access Manager)
Gareth Morris (Primary Governors Maintained)
Kevin Rivett (Union Representative)
Ivan Kuzio (Academy Bursar)
Denise Gwizdak (Early Years Rep)
Andrea Dyson (Early Years Rep)

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 and Calderdale Governor Association & Phil Hannah's setting is part of the High Needs funding arrangements.

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 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

4. **Minutes of the Schools Forum held on 24 February 2025**

Minutes accepted as an accurate representation

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

The Co Vice Chair will continue to chair these meetings.

6. **Schools Forum Membership, Principles and Terms of Reference**

The Co Vice Chair is proposing to keep 24 members, 18 from a school, 6 non-school members and 2 from a special school or alternative provision, leaving 16 places. The proposal would be more or less, the same structure implemented now. Schools Forum would ask academies to send a representative from any part of the school system for example School Bursars or any staff member who would be interested in attending Schools Forum. Karen asked Schools Forum if they agree to take the proposal forward.

John Q: How do you see academy representatives being elected given there are multiple academy trusts in Calderdale?

Debby Simpson currently asks maintained and academy schools for members. This would be for the academies to determine exactly what the process would be.

John Q: What happens if there are more Academy possibilities than places?
This would go to a vote.

Action: Jemima to write to academies CEOs with the proposal around Schools Forum to either represent jointly and to go through a process together on how to agree a representative.
The Co Vice Chair agreed this would be very beneficial.

Rachel agreed with proposal but felt there needs to be clarity as to who the representatives can be for example, ensuring there is a SAT representative

Members agreed for the Schools Forum Membership, Principles and Terms of Reference to be published on the Calderdale Schools Forum website.

The Co Vice Chair wanted to bring succession planning to the attention of members and to think about appointing a new Chair in September who can contribute a full term of office. The Co Vice Chair also asked members to think about enlisting more substitutes, asking Debby Simpson to focus on the maintained schools and Jemima to write to the MATS and SATS, which Schools Forum agreed.

The recommendations in the report are to comment and agree on amendments and proposals included in Appendix 1, approve the Schools Forum principles and Terms of Reference to publish on the website and consider the number of substitutes and note the Chair and Co Vice Chair requirements for the next academic year to which members agreed.

7. Impact of allocation of funding School Improvement School Clusters (24/25)

This is Connie's last meeting, and she has enjoyed the collaborative work taking place to support schools.

In March 2025 each cluster completed a progress report for September / October. There is a focus on SEND supporting the work Emma and her team are leading on. The Headteachers Well-Being Strategy is currently being developed for all Heads in Calderdale. John thanked Connie for her report and the work she has contributed to the clusters. Co Vice Chair also thanked Connie for her hard work on the cluster and Schools Improvement and wished her the best.

Rachel Q: The underspend from 2024-25 was highlighted in a report in the last meeting, will this be discussed today? because I think if the forum does agree to spend some of that underspend or dedicate some of it to cluster improvement, the sooner the better. She also commented that the cluster work is fantastic, the impact is very clear and there is a good focus on priorities.

Jemima and I took the action back and worked with cluster officers and School Effectiveness who created several proposals however, they were asking for more than the money available. I met with Jemima to look at how the proposals would work across other service areas as well with the action to revisit them to make the most of the money. This paper will be brought to the meeting in July and Steve has the final figure

Chair Q: Steve please can you tell us the final figure?

It is looking like £110,893 as I think everything has gone through. This is the final figure, but it may alter slightly.

Jemima reiterated members thanks to Connie and for leading the system for schools across the council and strengthening those relationships. Jemima highlighted that schools repeatedly ask for support around children who are dysregulated so there may be an opportunity to use some of the money for this.

Action: Jemima to have conversations with schools around the proposals and ask them to complete an email consultation by voting on which proposal they prefer.

The Co-Chair agreed to move to the recommendations that the money is awarded to Schools Forum, recognising that there is still a discussion to be had in the exact way the £248,000 will be allocated. To note that Jemima will bring the report on the £110,000 underspend to the next meeting after the consultation process.

8. School Rebuilding Programme, School Capital Funding and Free School Update

Jemima presented the report in Richard's absence.

The money that comes through Capital is not subject to Schools Forum decision making but the LA wanted to be transparent around how the money is spent. The report shows the four strands of funding that are sent to the LA which are the Capital Maintenance funding, the Basic Needs funding, High Needs Provision Capital Allocations and Local Authority Investment. There was an agreement at Cabinet to invest £14 million into school estate.

The School Rebuilding Programme in Calderdale has been effective at collating evidence to support the successful DFE rebuilding projects for 12 schools in the next round. There will be four schools starting this before December 2025 and a further eight in the next two years due to the LA being proactive in obtaining condition reports for schools demonstrating a strong practice.

There are two potential new free schools in the pipeline however, these projects are currently on hold. The agreed Delta project is currently under evaluation as value for money under the new government and an application for a new special free school isn't currently open due to the government focusing on inclusive placements however we feel we have strong evidence for this to go ahead. The Delta project would be funded by the department and the Free Special school would be funded by Basic Needs. Capital maintenance funding is consistent amount every year which is put towards replacements of crumbling architecture and unstable roofing.

The Co Vice Chair asked that her thanks be passed on to Richard for the report which has helped Schools Forum to understand the Capital picture, especially in relation to the High Needs Deficit group. The Co Vice Chair expressed her disappointed in hearing the Free School projects are currently both on hold and are urgently needed but is confident the LA will keep highlighting the need. The Co Vice Chair will follow up her specific questions with Richard.

Mungo Q: Is there any indication as to when the Free Schools programme will resume? In every strategy we have, it is underpinned by creating more spaces and we are not able to get started. The current government have been in for around 9 months, and it is becoming frustrating, do you have any ideas around timescales?

I have been told that some of those decisions are linked to the governments comprehensive expenditure review which is due to be announced soon. Richard, Emma, Connie and I meet with the department roughly every three weeks and we ask each time about the pre-school application process. In the proposed Wellbeing and Schools Bill the implication is that it may be possible in future for Local Authorities to open a school without the need of going through a Free School application. We also spoke to the department around the risks of the LA

building the school before the Free School application was approved and they advised that the local authority would be proceeding at risk and advised against this. We are working hard with our existing specialist schools to try and expand provision in imaginative ways by using empty spaces in some of our smaller schools and how we can use the cluster arrangements we already have. We keep pushing for answers for those big questions. I know that Robin Tuddenham and Julie Jenkins met with our MP Kate Dearden who is taking our concerns back to government regularly to move things forward.

John Q: On a sperate note, chair, which I hope is ok for me to raise, on the primary needs of children with an EHCP in Calderdale the autistic spectrum disorder has risen dramatically over the last three years, are there any significant factors in this or is there just a massive increase which is all part of the problem we are trying to solve?

Emma replied potentially this is a national issue across the board. It is 54% nationally around autism which is significant and is not just Calderdale. We are feeling the pinch just as much as everyone.

Debbie Q: I am glad you mentioned we are trying to be innovative Jemima. I know there's a pause on the specialist school and the through school but regarding the £20 million that is allocated, whether the pause is lifted or not, is there any way you can use it for the falling rolls issue with there being lots of vacant schools increasingly moving towards possible amalgamating with small schools, can the DfE stop the LA from using that money to redesignate those schools?

We would have to go through a significant changes application and the LA would be the decision maker for maintained schools but the DfE would be decision maker for academies. If we use the money and then the school is agreed, it won't be made available to us again because this I money the LA has saved over the last number of allocations of Capital funding.

Debbie Q - Is there a Plan B piece of work in case they say no and is that a piece of work that is possible, planned or happening? If you look at the number of places that are going to be created using the £20 million to create one school and then you look at the number of places that potentially can be created, redesigning and redesignating current schools and I am just wondering whether there is a comparison there?

There is a lot of thought going on around this. If we wanted to redesignate a school, we would need to close it and then would be back completing a free school application and looking for a trust to take it. Closing a school is very complex. The LA are exploring the ARPS and satellite classrooms for schools with falling rolls.

The Co Vice Chair advised members that if they had any more detailed questions regarding the report, to speak to Richard outside of the meeting.

9. High Needs Block Funding and Expenditure - DSG Management plan review April 2025

This is challenging for not only Calderdale but also nationally. We are part of that ESFA monitoring and the LA are meeting with them on the 8th May. Recommendations can be brought back to the meeting in July. The overspend has increased every year and is projected to be significantly higher. The LA are trying to mitigate this as much as possible to try and slow the flow of the overspend. The LA continue to talk with the DfE around the special schools and continue to drive forward with the ARP programme with Calderdale

settings. Making sure there are specialist places in the borough. There are excellent Specialist Independent providers in Calderdale and will still need them.

Debbie Q – None of the data for the special schools are correct. Is this due to not including surrounding LA's including Bradford, Wakefield and Kirklees? It would be useful to include due to special schools being under pressure from the children of neighbouring authorities. Yes this is Calderdale only but I can include that.

Debbie Q - I think a big contributor to the overspend is the fact that education is propping up services in care and health. So when we talk about SEMH, how are you including that responsibility, particularly around the funding and what the costs are around those gaps in care and health that should form part of the provision that is contributing to and making these children's successful?

I meet monthly with the Tracy Biddle in Health and Muir at Open Minds, and I also attend the Joint Funding panel. I agree there is a gap, and it is something we need to be more focused on. I will pick this up with Health as we are currently working with Open Minds around EBSA

Debbie Q - So are those gaps contributing to the overspend?

Particularly around the EHCP, and whether it's a healthcare need specific to learning, or whether it's a healthcare need in general. How we work with our partners around funding is a large piece of work across the partnership. There are questions around the funding being for a young person in learning and whether elements are education funded via high needs or a medical need meaning, therefore health funded. It is not always straight forward, and we need to ensure a shared understanding around this.

Mungo reiterated that he knows colleagues at Primary who would love to help with this to bring in their knowledge. He has spoken to primary heads and members of parliament who are keen to help and support around falling rolls. There are empty rooms in buildings and the expertise of staff can help to accelerate this. He is seeking the support of two MPs on this. Emma and Jemima work with Mungo and the CPHA to formulate a meeting.

Jemima thanked Mungo and Debbie for championing the cause and their expertise working on the ground with the children.

The Co Vice Chair Q: Steve, on page 3 of the report, the table is not clear around the £3.8 million and the paper reads there will be a deficit of £38 million at the end of 2025/26? The £6 million is what we have already accrued. This was £860,000 in 2022/23 and a further £5.2 million in 2023/24. That's a cumulative overspend that we have put on the balance sheet. Then the next figure is the £14 million that we're expecting in 2024/25 on top of what we'd already got.

The Co Vice Chair proposed that the table be reproduced and circulated once the information is available to members due to being anxious around the overspend.

Action: When the stats are produced in future, Steve to produce an additional paper with the final figures and advise as to how government are proposing to deal with the cumulative overspend.

10. School Balances – Spring Monitoring for Maintained and Academy Schools

The report is mostly related to maintained schools, but the Appendix B shows academy balances from their websites as of 31st August 2024. There are currently 4 maintained schools causing concern, one is projecting a deficit, and three others are projecting balances of less than £20K which are discussed at the schools causing concern meetings. The current forecast for maintained schools is £9.2 million and the Academy balances at £14.4 million. 9 academies have pool budgets, and the accounts were not published on the website at the time for some of the academies that are shown in Appendix B. The recommendations are to note and a further report will be brought to Schools Forum in July for the final out turn for maintained schools.

Phil Q: Midgley school balances previously looked good but in the report it shows them as having no money?

This is because they school has now transferred to an academy meaning they are now in the academy balances, and I reported on their balances in October 2024.

Co Vice Chair Q: Can I ask about Savile Park Jane?

This is an anomaly as they didn't submit a budget which is not at the fault of the school therefore, we didn't receive any financial summaries for them during the year against their budget, although I have got an out turn position for them. I can't force them to complete a monitoring budget when we have not approved their budget.

Co Vice Chair Q: So for the July report, you'll be bringing the final balances and the budgets? I suspect when we see the budgets for 2025/26 the future budgets will be present as well?

Yes, we ask for 3 years but they do not look positive. We have had a small indication of the Staff Pay Award, which was 2.8% but this could increase. I am currently waiting for the Comprehensive Spending Review because when we sent our budgets out to our maintained schools, we didn't apply an increase for the next two years because when I went to the national funding conference, the indication was that education is not on the government's priorities for additional funding.

Rachel Q: There are a handful of schools that have quite excessive balances in excess of 20% and they're growing. So, what is the process for monitoring those schools and schools justifying those balances?

We did have the clawback mechanism, but Schools Forum agreed to pause this for the last few years. Therefore, some of the schools have big capital projects that they are saving the money for. Woodbank, for example, are having an expansion so we know some of that money is going to be used as their contribution towards that capital scheme.

It is very difficult when a school send in a budget, and it's reduced significantly when the money is not spent. We do challenge them on their budgets, if they have a large amount we send a letter explaining that their budgets are holding more money and should be spent on pupils currently in school.

Rachel Q: It is frustrating to see some schools have more money than others. When will Schools Forum be able to have another discussion around clawback?

This is normally brought to the July meeting.

Mungo Q: Ash Green, 90% of our budget spending is around staffing and support staff. A year ago primary heads asked those who were in excess to explain how they have this as there needs to be some accountability. I feel it would be positive for some communication to be sent, to ask if your balance is in excess of a certain amount. I do not want to go back down the clawback route. Some academies are not listed on appendix B, do they have to declare their budgets?

Yes, they are supposed to. We can't pull out what their element is because they have decided as a MAT to pool their budgets meaning all schools in the MAT share one budget. The ones that are not published should be reported as they have to publish their budgets on the website by 31st January. As they are academies, we have no power with their balances.

Phil Q: - Where is the data in appendix B from? I have looked at my budgets and this does not look correct.

I have been on every academy website and looked at their yearend accounts. The amount for yours is what has been provided by your accounts on the 31st August.

The Co Vice Chair commented that if the academy budgets are not published, then the MAT needs to be advised they are not complying with the Academy Trust Handbook. She doesn't think there is any reason why the Local Authority should not enforce that. It would be useful to add an additional column to show the MAT they are part of to tie up the central funds.

CO Vice Chair Q: Are you able to put the percentage against the total income?

This would be very time consuming, and I am not sure the data is there to be able to do this. I can add a column to say which MATS the schools are part of.

Jemima stated in her last authority, they worked with the ESFA who have advisors to work with schools if they have difficult budgets or very high reserves. This might be something we could explore with the DfE and ask if that support is still available however, this was some years ago. Jane said we did use SMRA's and school have taken advantage of this but there hasn't been much proactiveness with these.

The Co Vice Chair asked members to note balances for when Jane brings her report in July. Schools Forum can look at the issues of schools being over 20% and prepare something to make them accountable.

Rachel Q: For the meeting in July, would it be possible to have the previous years end of year budget balance to see how these schools are trending? The end of year balances in some schools are growing so it would be useful to understand which schools we are focusing on. It would be useful to have the data presented as a percentage.

The maintained schools in the report have last year's balances, it is the surplus brought forward. I agree on the data being presented as a percentage.

11. Any Other Business

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

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12. Future Dates

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

Report to Schools Forum

Item	5
Meeting Date	Thursday 3 July 2025
Subject	Exclusions Funding Clawback
Report Author	Dafydd Cherry

Report purpose

It is the responsibility of the LA to clawback funding from schools and academies that permanently exclude pupils through an agreed policy. The purpose of this paper is to seek an agreement to make changes to the current permanent exclusion clawback agreement which is currently in place.

Need for consideration

This report is brought to Schools Forum to raise the awareness of the current issues around the high number of permanent exclusions across Calderdale within both the primary and secondary phase. There is significant lagged data when analysing permanent exclusions nationally, however the latest published national statistics place Calderdale in Quartile D for exclusions and suspensions in both the primary and secondary phase. The total number of exclusions in primary and secondary placed Calderdale 140th out of 152 local authorities.

Need for decision

This report is brought to Schools Forum to ask for the approval to make changes to the current agreement in relation to the permanent exclusion clawback of funding which is currently in place.

Contact Officers

Dafydd Cherry
Dafydd.cherry@calderdale.gov.uk

1. Background information and context

During the last four academic years there has been a significant rise in the number of permanent exclusions issued in Calderdale.

	2020/21	2021/22	2022/23	2023/24
Number of Permanent Exclusions	41	78	98	101
Calderdale Exclusion Rate (exclusions as % of school population)	0.13%	0.26%	0.29%	0.30%

Analysis of 2023-2024

Table 1 shows the breakdown of permanent exclusions across the two phases and the breakdown of the total clawback of funding from each stage during 2023/24.

	Permanent Exclusions	Total Clawback	% of total clawback
Primary Phase	23	£88,787	17.3%
Secondary Phase	78	£424,940	82.7%

Table 2 shows the breakdown of the total expenditure against clawback for permanent exclusions during the academic year 2023/24.

Expenditure	£2,189,162 + £41,074
Clawback	£513,727
Variance/Outturn	-£1,716,509

Table 3 shows the number of permanent exclusions by each year group during the 2023/24.

Year	1	2	3	4	5	6	7	8	9	10	11
Pupils	3	3	2	4	5	6	13	18	13	25	9

It is of significant note that currently in Calderdale we have no specific provision to support KS1 (Year 1 and Year 2) permanent exclusions. Throughout this academic year preventative work and the strategic deployment of resources has ensured, to date, there has been no permanent exclusions in key stage 1.

The total cost of provision for pupils who were permanently excluded during the 2023/24 academic year was £2,230,236. It must be noted these costs may rise due to inflation in future years and that additional places have been sought this year to address the current capacity issues

Financial Implications

The Government have produced a summary of the legislation for permanent exclusions which is available on gov.uk website. The following points are extracts from that document:

181. The local authority cannot require a maintained school or academy to make any additional payments following a permanent exclusion, other than the budget share deductions set out in regulations, or the payments which an academy must make under its funding agreement.

183. A local authority may ask an academy trust to enter an arrangement for the transfer of funding for a pupil who has been permanently excluded, on the

same basis as if the academy were a maintained school. The academy trust may be obliged under its funding agreement to comply with such a request.

The table below shows the formula factors used in the calculation of the clawback based on the DFE's 2025-26 National Funding Formula (NFF) schools' funding formula factor values (subject to change every year).

	Primary (KS1 & KS2)	Secondary (Years 7 - 9)	Secondary (Years 10 -11)
AWPU	£3803.98	£5361.39	£6044.66
FSM	£495.08	£490.08	£490.08
FSM 6	£1060.18	£1555.26	£1555.26
IDACI (Band A)	£685.12	£950.16	£950.16
EAL	£595.10	£1595.27	£1595.27
Mobility	£965.16	£1385.24	£1385.24
Low prior attainment	£1175.20	£1785.30	£1785.30
Pupil Premium	£1515	£1075	£1075
Total	£10,294.82	£14,197.70	£14880.97

The current agreement in Calderdale is that at the end of the financial year all schools are contacted and the permanently excluded pupils funding is clawed back in accordance with the guidance outlined above. Currently the clawback is simply

used to support the cost of the students placed in the statutory day six provision.

The cost of this provision in 2023/24 was £2,189,162. The majority of this amount is fixed through a three-year SLA and additional funding has been allocated for students who have entered the provision long term with an EHCP.

The clawback is currently actioned at the end of the financial year and only carried out annually.

The current agreed Calderdale process for all schools, both at primary phase and secondary phase is that the AWPU and Pupil Premium funding is clawed back (whether the pupil is pupil premium or not) on a pro rata basis. The total clawback is currently used against the cost of the statutory day 6 offer.

2. Main issues for Schools Forum

Without changes to the current systems in place, the continued rise in permanent exclusions and the non-existent number of children being reintegrated back to mainstream school will result in the statutory duties of day 6 provision not being carried out.

We would require further provision to be sought at a significant cost to the LA. The capacity issues would result in limited preventative work, the current support in place of bespoke packages including key stage one children, students who have received two permanent exclusions and children at risk would become very limited.

3. Recommendations

The recommendations for approval relate to changes in the agreement in relation to the clawback of funding following a permanent exclusion.

The recommendations include three significant changes –

1. A fixed tariff is agreed for all permanent exclusions across all school phases in Calderdale. A proposed tariff of £8000 for Primary phase permanent exclusions and a tariff of £10,000 for Secondary phase permanent exclusions from September 2025.
2. The clawback is to be carried out three times a year, with the proposal being at the end of each academic term. This will allow both schools and the LA to strategically monitor and measure the implications of exclusions on their financial budgets.
3. To drive a culture and embed a vision of inclusion, when a child returns to mainstream education through the FAP process, the financial resource follows the child, ensuring the transition and support a child receives can be resourced to ensure success. A recommendation of £6000 for the primary phase and £8000 for the secondary phase is proposed.

The variance in the clawback would then be used to support preventative work where appropriate, support bespoke packages for children, support key stage one

children at risk of permanent exclusion and other initiatives such as the Nexus programme and other preventative work.

The clawback of the tariff would take place termly to ensure that both the local authority and schools can measure and identify the financial implications of permanent exclusions on their budgets.

4. Reasons for recommendations

Under the current model both the schools and local authority do not know the financial implications of the permanent exclusions on their financial budgets. When the clawback is initiated, it is often an unknown amount to the schools and they are often unaware of this charge.

To drive a culture of inclusion and support children who are returning to mainstream school, the vision of all settings has got to be around children remaining in their local schools with support. The current work around the three tier AP model will support this but where children have been permanently excluded, to return to a mainstream setting with support; both a resource and physical support, would allow capacity for preventative work.

5. Impact of funding, targets, and milestones

The statutory day 6 commissioned provision for permanently excluded children has risen over the last four years. In the academic year of 2020/2021, 41 permanent exclusions resulted in a spend of £502,600 directly linked to statutory support for

permanent exclusions. In 2024/25, the cost of the commissioned places had risen to £2,259,202 for 90 places.

An initial target for 2024/2025 is to reduce the permanent exclusions and increase reintegration to ensure that the number of day 6 places is reduced to a capacity of eighty next year (ten less seats, £250,000 saving).

The strategic management of the capacity alongside pro-active preventative places, and support for students who make up the most vulnerable cohorts will also bring additional savings on the wider LA.

A financial strategy and specific use of budgets from the structured tariffs put in place would then allow key milestones, targets and key performance indicators to be established and governance to hold the key stakeholders to account.

6. Resource implications

The current budget in place for AP for Hard to Place children (£60,000) each year would be abolished and the strategic management of the tariff clawback would be used to facilitate the current use of this budget line.

7. Appendices

N/A

Report to Schools Forum

Item	6
Meeting Date	Thursday 3 July 2025
Subject	Central Services to Schools Block (CSB) contingency - options paper
Report Author	Jemima Flintoff Karen Hackett

Report purpose

To seek agreement from Schools Forum about the use of a £110,983 underspend from the Central Services for Schools Block.

Need for consideration

The underspend was generated by staffing vacancies in the Central Services Teams, which may not happen again or to the same extent. Ensuring the underspend has the most impact on children's educational experiences and outcomes is a key consideration.

Need for decision

Appropriate Forum members should vote on how the underspend from Central Services for Schools should be spent.

Contact Officers

Karen Hackett, Service Manager – Education Quality & Strategy
Jemima Flintoff, Assistant Director – Education & Inclusion

1. Background information and context

- a)** The Central Services for Schools Block (CSSB) of Dedicated Schools Grant (DSG) is to pay for central support functions such as admissions and education welfare. Last financial year Calderdale underspent on that budget so Schools Forum can allocate this funding.
- b)** Part of the CSSB is the Historic Commitment element, which funds school to school support through the Clusters as well as School Effectiveness.
- c)** The Education Partnership Board that oversees the work of School Clusters. Cluster funding is distributed to each cluster based on pupil numbers, and the Partnership Board has previously been asked to distribute where there has been additional funding. Around two years ago this approach stopped as the overall amount had reduced, and there was no additional funding to support the bidding process.
- d)** When the LA were asked to suggest how to spend the additional funding in the autumn term 2024, the process defaulted back to bids. The Cluster Leads provided feedback against a wide range of ideas. These can be broadly split into three options:
 - I.** To split between the clusters to use on a priority they have identified which they must report back on as they currently do
 - II.** To spend in small amounts including training for the new inspection framework and curriculum review
 - III.** To increase support visits for green schools to 1 day per year in order to provide more support and oversight to all maintained schools

2. Main issues for Schools Forum

a) The following central services are allocated funding from the CSSB to meet the LA's statutory duties for all schools:

- I. Education Welfare
- II. Exclusions
- III. HR Pensions
- IV. LFM Finance
- V. SACRE
- VI. School Organisation and Planning
- VII. Strategic Planning for Education

The underspend has come from vacancies in central administration teams.

b) However, the underspend can be used flexibly to support school improvement through a centralised offer, eg through school effectiveness, or to support the development of sector led school improvement and sharing of best practice,. It is unlikely this underspend will occur again so agreeing the best use of funding to improve outcomes for children is important.

3. Recommendations

It is recommended that Schools Forum considers the options carefully, to ensure that the funding has maximum impact for the most children. It is recommended that the funding is used to increase support for green schools through the school effectiveness team.

4. Reasons for recommendations

Schools self-evaluate using the Calderdale Risk Assessment. Schools that are green on that risk assessment currently receive half a day support per academic year. That is effectively one visit. In the current context of a new curriculum and new inspection framework, increased pressure on school finances and its impact on leadership resilience, it is suggested this approach will ensure support for greater

resilience as the sector goes through a period of change. Increasing the time would allow a full day review, for example curriculum or leadership review, or could be split across the terms to two half day or three shorter visits

5. Impact of funding, targets, and milestones

Contained in the report

6. Resource implications

Contained in the report

7. Appendices

[Schools operational guide: 2025 to 2026 - GOV.UK](#)

[Central school services block national funding formula, 2024 to 2025: technical note](#)

Report to Schools Forum

Item	7
Meeting Date	Thursday 3 July 2025
Subject	Maintained Schools Outturn as at 31 st March 2025 and Three Year Budget Plans
Report Author	Jane Davy

Report purpose

To provide Schools Forum with the final revenue balances for all maintained schools at the end of the 2024/2025 financial year and the estimated revenue balances for all maintained schools following receipt of their budget plans for the next three years.

Need for consideration

Schools Forum members to consider the information contained within the report

Need for decision

Members to vote on the continuation of the suspension of the clawback mechanism

Contact Officers

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

1. Background information and context

- a)** All schools hold revenue balances at the end of each year to allow for unforeseen events and emergencies, and in some cases to smooth out the effects of changes in school rolls, changes to staffing structures and one off expenditure such as building work.
- b)** The Council holds separate reserves or balances to cover the same events for all other Council expenditure. Schools are specifically excluded from the use of these balances and therefore need to maintain their own balances.
- c)** School Forum agreed to maintain the clawback mechanism in the scheme for financing schools to ensure schools could be held to account if they held excessive balances.
- d)** The Scheme for Financing Maintained Schools requires maintained schools to submit a three-year budget statement by the beginning of May, detailing how school resources are planned to be spent. These statements also show estimated school balances at the end of each year.
- e)** The Scheme also requires school budget plans to be approved each year by the Local Authority. This is generally light touch but facilitates more work being undertaken where budget deficits are being projected.
- f)** This report covers Calderdale's 46 maintained schools for outturn (1 secondary, 42 primary and 3 special schools) and 45 schools for planned budgets (the secondary school transferring to academy status on the 1st April 25) . This report excludes academies that are subject to separate Education and Skills Funding Agency (ESFA) monitoring.

2. Main issues for Schools Forum

- a) Schools initially projected collective surplus balances of £6.78 million as at 31st March 2025. Their recent spring term monitoring statements projected revised surplus balances of £9.56 million.
- b) The accounts for all schools are now closed and the overall level of balances in Calderdale's 46 maintained schools (including community focused balances and cluster fund balances) is £10.13 million. Within this sum the amounts per sector are primary £6.22 million, secondary £1.15 million, and special £2.76 million.

This is an overall increase in balances on last year of £332k. A summary of the revenue balances held by each sector compared to last year is shown below (adjusted for academy conversions in year):

	Balances as at 31 March 2024	Movement	Balances as at 31 March 2025
	£000's	£000's	£000's
Primary	5,743	+479	6,222
Secondary	1,021	+126	1,147
Special	3,032	-273	2,759
Total	9,796	+332	10,128

- c) In the secondary school sector, there is one LA maintained schools, which has increased their surplus.
- d) In the primary sector balances have increased overall, one school is in deficit, 41 Schools are in surplus. 3 schools are holding balances more than 20% of their

annual income. 5 schools are holding balances either less than £20k or less than 2% of total income.

- e) In the special school sector, 2 schools balances have decreased, 1 increased, 1 school is holding balances over 20% of total income. However, it is known this school will be using a significant amount to fund building programme in 25/26.
- f) The Local Authority, in consultation with Schools Forum, introduced a balance control mechanism in 2011. In the first two years of the mechanism schools with balances above the recommended threshold were required to provide evidence of their commitments and some were subject to time limited arrangements at the end of 2011/12. However, Schools Forum agreed to suspend the balance control mechanism from 2020/21 onwards. As mentioned above in 1c it was agreed to keep the clawback mechanism in the Scheme for Financing Schools so that the LA and Schools Forum can hold any school to account if they continue to hold excessive balances over several years.
- g) Maintained schools were asked to submit their three-year budget plans by 1st May 2025, 25 budget statements were received by the deadline, the remaining returns were received by the 19th May 2025. At the time of writing the reports 43 schools have been written to approving their budgets. 3 schools are projecting deficit budgets and have been written to individually. 1 school although submitted their budget have not yet had this approved by their governing body due to too many uncertainties, they have been asked to resubmit once the governing body have approved their plans.
- h) From the remaining 41 Schools, 9 schools are projecting to be in surplus for all three financial years. 17 schools are projecting to be in surplus for two years and then fall into deficit in year three, these schools will receive letters approving 25/26 and

asked to look at making future savings when setting their 26/27 to 27/28 budgets. 7 Schools are projecting a surplus for 25/26 with deficits for 26/27 and 27/28, some of these schools will be asked submit monthly monitoring statements and all will be asked to resubmit a budget for 26/27 in October 25 when future pupil numbers and funding will be more certain. 5 Schools will be written to individually as although they are not in deficit and are currently causing financial concern. 2 schools are federating their budget in summer and have been written to ask them to resubmit the federated budget by the end of the summer term. The final school is budgeting to be over the recommended threshold at the end of 25/26 but drop below this in future years.

- i) As mentioned above balances brought forward from 24/25 total £10.128million, maintained schools plan to reduce this to £6.267 million by March 26. Primaries reducing to £4.47m and special schools reducing to £1.797m.
- j) For the longer 3 year period 30 schools are projecting deficit balances. However, schools have been prudent when projecting income for year three due to lack of information and based their budgets on known funding available. If the increase in income is not sufficient, these schools will have to look at reducing their expenditure from 26/27 onwards.
- k) At the time of presenting this report all schools (except 1) should have received a letter confirming that their submitted budget for 25/26 has been approved, as mentioned above some of those letters sound caution around the longer term projections and advise schools of the need to re-examine their plans for future years.
- l) Appendix A shows individual balances as at 31st March 25 and projected balances as at 31st March 26.

3. Recommendations

- a) Members note the maintained schools' balances as at 31 March 2025.
- b) Members note the original budget projections for the next three financial years.
- c) Maintained members asked to vote on continuation of the suspension of the balance control mechanism.
- d) A report is brought to the autumn term meeting based on Autumn 2025 projections.

4. Reasons for recommendations

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

5. Impact of funding, targets, and milestones

None unless Clawback mechanism is implemented

6. Resource implications

None unless Clawback mechanism is implemented

7. Appendices

Appendix 1 – Maintained School Balances as at 31st March 2025

Appendix 2 – Maintained Planned Budgets

Appendix 1 - Calderdale Schools - Budget Monitoring 2024/25

Code	School Name	Surplus b/wd 2024/25	Budgeted Income 2024/25	Original Budget 2024/25			Autumn Term Monitoring		Spring Term Monitoring		Balance as at 31st March 2025	
				In-year deficit or surplus £	Original forecast	Year End Balances	Revised forecast	Year End Balances	Revised forecast	Year End Balances	Final Surplus	Year end Balances
					£	%						
	PRIMARY SCHOOLS											
6402	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%	72,168	5.72%
6436	Ash Green Primary School	156,417	3,554,933	-12,273	144,144	4.05%	219,120.00	5.45%	293,724	7.31%	321,673	7.76%
6202	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%	136,580	11.46%
6203	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%	145,409	9.97%
6407	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%	66,375	3.23%
6408	Castle Hill J & I School	41,170	1,203,564	-40,582	588	0.05%	70.25	0.01%	-6,593	-0.53%	-8,979	-0.71%
6207	Central Street Infant & Nursery School	118,974	758,796	6,279	125,253	16.51%	96,366.96	11.11%	102,532	11.65%	144,581	15.59%
6409	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%	13,836	0.83%
6208	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%	15,689	1.85%
6209	Cliffe Hill Community Primary School	32,325	1,667,702	-6,557	25,768	1.55%	3,500.50	0.21%	281	0.02%	6,612	0.39%
6210	Colden J & I School	18,102	626,014	7,945	26,047	4.16%	21,781.95	3.43%	29,263	4.58%	35,384	5.51%
6211	Copley Primary School	325,412	1,891,643	-78,146	247,266	13.07%	288,270.93	14.65%	365,557	18.41%	380,273	19.07%
6212	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%	86,554	7.20%
6410	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%	153,205	6.49%
6411	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%	262,869	19.63%
6412	Ferney Lee Primary School	129,481	1,548,403	-41,831	87,650	5.66%	112,246.49	7.02%	146,757	8.99%	122,432	7.53%
6221	Holywell Green Primary School	61,707	1,077,003	-22,083	39,624	3.68%	17,249.95	1.53%	650	0.06%	17,153	1.51%
6418	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%	333,746	12.84%
6419	Longroyde Junior School	57,603	2,471,010	9,104	66,707	2.70%	112,559.70	4.43%	106,894	4.20%	149,435	5.81%
6442	Moorside Community Primary School	153,461	1,992,750	-24	153,437	7.70%	144,698.30	7.20%	219,560	10.55%	197,318	9.37%
6230	New Road Primary School	224,278	1,251,284	49,459	273,737	21.88%	300,116.98	22.88%	342,456	25.36%	362,636	26.71%
6232	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%	67,767	11.77%
6420	Northowram Primary School	56,693	2,547,195	-53,219	3,474	0.14%	60,426.54	2.29%	105,582	3.94%	107,462	4.00%
6422	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%	1,053,905	28.07%
6234	Ripponden J & I School	155,913	1,167,660	-4,081	151,832	13.00%	95,964.00	7.67%	88,468	7.09%	62,136	4.85%
6425	Riverside Junior School	129,430	1,816,522	-21,117	108,313	5.96%	56,228.00	5.08%	60,602	5.39%	78,554	6.82%
6247	Salterhebble J & I School	45,284	1,297,992	-6,999	38,285	2.95%	21,314.38	1.61%	28,308	2.08%	35,653	2.59%
6414	Savile Park Primary School	130,404	2,860,008	-29,517	100,887	3.53%	0.00	0.00%	0	0.00%	141,555	4.50%
6250	Shade Primary School	33,005	1,120,947	-26,826	6,179	0.55%	36,585.31	3.04%	76,228	6.11%	85,395	6.80%
6430	Shelf J & I School	76,443	1,356,061	-36,717	39,726	2.93%	56,375.21	4.00%	81,689	5.74%	103,134	7.23%
6236	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%	123,593	9.86%

6426	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%	134,661	8.19%
6242	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%	54,829	8.44%
6243	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%	131,903	9.81%
6255	Stubbings Infant School	97,361	388,775	-30,206	67,155	17.27%	71,707.00	15.82%	73,970	16.24%	123,434	25.65%
6431	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%	304,740	17.69%
6256	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%	60,367	5.10%
6257	Tuel Lane Infant School	48,095	610,265	-31,921	16,174	2.65%	-9,401.93	-1.52%	775	0.12%	10,557	1.62%
6443	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%	133,122	11.48%
6261	Warley Town School	88,292	856,836	583	88,875	10.37%	83,473.71	9.24%	104,779	11.47%	106,131	11.28%
6253	Withinfields Primary School	135,307	2,349,283	-8,048	127,259	5.42%	69,096.05	2.89%	53,665	2.22%	106,982	4.32%
6433	Woodhouse Primary School	110,812	2,284,749	-43,964	66,848	2.93%	73,039.79	3.20%	201,452	8.44%	181,438	7.57%
	TOTAL PRIMARY SCHOOLS	5,743,403	64,270,226	-1,937,157	3,868,867	6.25%	4,245,853	6.64%	5,622,973	8.76%	6,222,269	9.15%
						1		2		3		3

Code	School Name	Surplus bfwd 2024/25	Budgeted Income 2024/25	Original Budget 2024/25			Autumn Term Monitoring		Spring Term Monitoring		Balance as at 31st March 2024	
				In-year deficit or surplus £	Year end balances		Year end balances		Year end balances		Final Surplus £	Year end Balances %
					£	%	£	%	£	%		
	SECONDARY SCHOOLS											
6616	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%	1,146,551	16.42%
	TOTAL SECONDARY SCHOOLS	1,021,120	16,356,537	87,712	1,040,860	13.57%	2,228,576	13.62%	1,142,507	16.76%	1,146,551	0.00%
						0		0		0		0

Code	School Name	Surplus bfwd 2024/25	Income 2024/25	Original Budget 2024/25			Autumn Term Monitoring		Spring Term Monitoring		Balance as at 31st March 2024	
				In-year deficit or surplus £	Year end balances		Year end balances		Year end balances		Final Surplus £	Year end Balances %
					£	%	£	%	£	%		
	SPECIAL SCHOOLS											
6802	HIGHBURY SCHOOL	500,759	4,372,116	68,914	569,673	13.03%	572,320.00	13.09%	547,524	12.14%	334,426	7.54%
6800	RAVENSCLIFFE HIGH SCHOOL	1,101,237	6,708,244	-482,043	619,194	9.23%	774,463.00	11.54%	895,922	12.54%	926,624	12.87%
6803	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%	1,498,084	38.16%
	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%	2,759,133	17.73%
						0		1		1	0	1

	TOTAL ALL SCHOOLS	9,796,298	95,103,278	-3,013,368	6,777,579	8.52%	9,280,260	9.79%	9,560,145	11.07%	10,127,953	11.19%
						1		3		4		4

Appendix 2 - 2025/26 SCHOOL BUDGET RETURNS

SCHOOLS	Balance at 1.4.2025	Surplus/Deficit 2025/26	Projected balance at 31.03.2026	
	£	£	£	%
All Saints' CE (VA) J & I School	72,168	13,974	86,142	6.50
Ash Green Primary School	321,673	-111,594	210,079	5.52
Bailiffe Bridge J & I School	136,580	-35,130	101,450	8.87
Barkisland CE (VA) Primary School	145,409	-33,859	111,550	8.88
Carr Green Primary School	66,375	-8,214	58,161	2.79
Castle Hill Primary School	-8,979	19,982	11,003	0.51
Central Street Infant & Nursery School	144,581	-39,982	104,599	12.85
Christ Church (Pellon) CE (VC) Primary School	13,836	2,311	16,147	0.97
Christ Church CE (VA) Junior School (Sowerby Bridge)	15,689	-29,302	-13,613	-1.61
Cliffe Hill Community Primary School	6,612	56,536	63,148	3.31
Colden J & I School	35,384	-16,497	18,887	3.22
Copley Primary School	380,273	-1,083	379,190	18.59
Cornholme J, I & N School	84,080	-36,789	47,291	2.55
Cross Lane Primary School	153,205	-34,320	118,885	4.70
Elland CE (VA) J, I & N School	262,869	-217,603	45,266	3.67
Ferney Lee Primary School	122,432	6,643	129,075	7.69
Holywell Green Primary School	17,153	-13,609	3,544	0.32
Ling Bob J, I & N School	333,746	-15,501	318,245	12.34
Longroyde Primary School	149,434	84,753	234,187	8.99
Moorside Community Primary School	197,318	-3,268	194,050	8.63
New Road Primary School	362,636	-13,399	349,237	26.10
Norland CE (VC) J & I School/St Mary's CE (VC) J and I Sowerby Bridge	122,597	-12,305	110,292	10.26
Northowram Primary School	107,462	-50,198	57,264	2.09
Parkinson Lane Community Primary School	1,053,905	-341,298	712,607	19.29
Ripponden J & I School	62,136	-22,479	39,657	3.11
Riverside Junior School	78,554	-34,497	44,057	3.82
Salterhebble J & I School	35,653	-2,466	33,187	2.34
Savile Park Primary School	141,555	-442,389	-300,834	-10.17
Shade Primary School	85,395	4,330	89,725	6.89
Shelf J & I School	103,134	-64,993	38,141	2.67
St Andrew's CE (VA) Infant School (Brighouse)	123,593	41,948	165,541	13.44
St Andrew's CE (VA) Junior School (Brighouse)	134,661	-13,534	121,127	7.04
St Michael & All Angels CE Primary School	131,903	-102,966	28,937	1.28
Stubbings Infant School	123,434	-30,941	92,493	18.86
Todmorden CE (VA) J & I School	304,740	-113,005	191,735	11.14
Triangle CE (VC) Primary School	60,367	-39,152	21,215	1.80
Tuel Lane Infant School	10,555	-21,841	-11,286	-1.82
Walsden St Peter's CE (VC) Primary School	133,122	-40,970	92,152	7.99
Warley Town School	106,131	-30,460	75,671	8.37
Withinfields Primary School	106,982	14,825	121,807	4.23
Woodhouse Primary School	181,438	-21,777	159,661	6.46
PRIMARY TOTAL	6,219,793	-1,750,119	4,469,673	9.24
Special Schools				
Highbury School	334,426	-34,995	299,431	6.32
RAVENSCLIFFE HIGH SCHOOL	926,624	-347,287	579,337	7.76
Woodbank Primary School	1,498,084	-579,618	918,466	23.05
SPECIAL TOTAL	2,759,133	-961,900	1,797,233	11.10
OVERALL TOTAL				
	8,978,926	-2,712,019	6,266,906	20

Report to Schools Forum

Item	8
Meeting Date	Thursday 3 July 2025
Subject	High Needs Block 2025-26 monitoring including activity
Report Author	Emma Ingham

Report purpose

To manage the increasing deficit within the Dedicated Schools Grant (DSG), a high needs deficit management plan is in place which seeks to stabilise the increasing overspend alongside improving outcomes for children and young people and creating a sustainable system within Calderdale to meet the needs of children and young people with SEND. This report is an update on progress and will be a standing item for reporting to school forum whilst the plan remains.

Need for consideration

For Information only

Need for decision

N/A

Contact Officers

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1. Background information and context

- a)** High needs budgets in English local authorities (LAs) have come under increasing pressure in recent years with a significant proportion of authorities finding it difficult to deliver their local need within the budgets allocated to them.
- b)** The DfE acknowledges the pressures which local systems are experiencing delivering Special Educational Needs and Disability (SEND) services and officers have been working with the DfE as a partner within the national Change Programme.
- c)** Previously, Calderdale has been one of the few LAs who have met the needs of their pupils with SEND within their Dedicated Schools Grant (DSG) High Needs Block (HNB). However, due to unprecedented pressure this position has significantly changed within the last two financial years.
- d)** The overspend within high needs for 24/25 financial year was £13,314,212 which together with overspends in 22/23 & 23/24 mean a cumulative overspend of £19,437,315. Despite this, Calderdale still does not currently meet the criteria for the Safety Valve Programme which is a DfE initiative to help local authorities address overspending on SEND services. However, The Local Authority are required to complete a DSG Management plan and report to the Education Skills Funding Agency (ESFA) to outline how it intends to tackle the overspend and mitigate against further cumulative expenditure. This management plan has been in place since the secretary of state agreed the 0.5% schools block transfer in February 2024
- e)** LA officers have responsibility for the plan completion and meet with the ESFA termly. The ESFA accepts that Calderdale will continue to have a rising

deficit in the short term whilst work is undertaken to bring the HNB into an in-year balance and the deficit is reduced.

- f) Calderdale Schools Forum continues to be a key partner in developing the high needs Deficit Management Plan which is a DfE requirement for LAs in deficit

2. Main issues for Schools Forum

- a) The Summer Term ESFA Monitoring meeting took place on Thursday 8th May 2025. The plan is a working document and whilst the LA are not required to submit the plan every month, officers will review and update on a monthly basis.

b) Identified Strengths:

- i. The LA has identified actions that fall in line with the Government direction of travel i.e. the utilising of funding to support mainstream schools in developing their own specialist type provision and the commitment to increasing additional resourced provision.
- ii. The commitment to creating additional non independent special school places.
- iii. That whilst there is an understanding that specialist independents are a vital part of our local SEND offer, the ESFA respect the LAs commitment in working to reduce the rate of increase in these placements over time.

c) Key points to address:

- i. The meeting took place during the close down of the 24/25 budget and therefore the 2024/25 figures were projected not actual spend. The plan has since been updated to reflect actual spend.
- ii. Some elements were identified as not being allowed to be attributed to High Needs. These were the Medical Needs Teaching Service and the Disabled Children's Team. Schools Forum is asked to note this. A paper addressing this will be brought to Schools Forum regarding this in the Autumn Term.
- iii. Further granular data analysis required on changed demographics. This is part of the sufficiency reporting the LA are currently producing.

d) The ESFA agreed Calderdale will provide an updated and revised plan by the 31st August, incorporating the above plus revised projections on all aspects of section 251 return relevant to high needs for 25/26.

e) Following advice from the Council's Audit Lead, the High Needs Deficit Recovery Group has been refined to internal the senior officers who are accountable for the completion of returns and delivery of mitigations included in the plan. All future versions will be signed off by the Council Chief Finance Officer prior to submission to the ESFA.

3. Recommendations

For Schools Forum to note the contents of this report.

- 4. Reasons for recommendations**
N/A
- 5. Impact of funding, targets, and milestones**
N/A
- 6. Resource implications**
N/A
- 7. Appendices**
N/A

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	
Activity paper for HNB every 6 months	July 2025, January 2026, July 2026
Medical Needs Team (MNT) – Pupil Funding Transfer and Delivery Model – James Robinson	October 2025

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 2025
Thursday 24th April 2025	Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	Monday 7th April 2025
	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	

Meeting date	Reports	Officer	Report for:	Deadline for papers
Thursday 3rd July 2025	Pupil Funding following permanent exclusions – Day 6 Clawback	Dafydd Cherry	Decision	Monday 16th June 2025
	Central Services to Schools Block (CSB) contingency - options paper	Jemima Flintoff Karen Hackett Steve Drake	Decision	
	High Needs Block 2025-26 monitoring including activity and Outturn	Emma Ingham	Information	
	Maintained Schools Outturn & Maintained Schools 3 Year Budget Plans	Jane Davy	Information	
	Sufficiency Audit	Jemima Flintoff	Verbal	