CALDERDALE SCHOOLS FORUM - 3 July 2025 Virtual Meeting Via Teams

PRESENT:
Karen Morley (Academy) – Co Vice Chair
John Eccleston (Academy Primary Governor)
Stuart Hillary (Academy Secondary)
Karl Veltman (Post 16 Representative)
Hamish Heald (Union Representative)
Stephen Baines (Academy Secondary)
Phil Hannah (Academy AP)
Debbie Sweet (Special School)
Brenda Monteith (Roman Catholic Diocese Rep)
Adam McNichol (Academy Bursar)
Alice Leadbitter (Primary Maintained Substitute)
Dan Burns (Academy Primary)
Louise Downing (Maintained Primary Governor)

OFFICERS IN ATTENDANCE:
Jemima Flintoff (AD Education and Inclusion)
Jane Davy (Finance Manager)
Steve Drake (Finance Manager)
Dafydd Cherry (Alternative Provision Lead)
Ian Hughes (Head of Legal and Democratic Services)

APOLOGIES
Schools Forum Members: -
Gareth Morris (Primary Governors Maintained)
Denise Gwizdak (Early Years Rep)
Andrea Dyson (Early Years Rep)
Duncan Hetherington (Primary Maintained)
Mungo Sheppard (Primary Maintained)
Rachel Harling (Academy Secondary)
Richard Horsfield (Academy Secondary)

Officers: -
Emma Ingham (SEND & Inclusion Service Manager)
Richard Morse (School Organisation & Access Manager)
Karen Hackett (Service Manager Education Quality and Strategy)

ABSENT
Schools Forum Members: -
Ivan Kuzio (Academy Bursar)

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

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.

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.
Corinne Kielty (Finance Officer)

4.Minutes of the Schools Forum held on 24 April 2025
There are corrections needed on page 8 regarding the academy budgets vs the final accounts. The Chair will work to correct this and ask for the amended minutes to be published.

The Chair reminded members the importance of tracking attendance for these meetings. Two consecutive absences may lead to the removal of a member unless the reason for the absences can be justified.

The Schools Forum Terms of Reference requires updating relating to agenda item requests, election procedures and substitutes to ensure members are clear around timescales. Any questions raised to officers need to be 3 days in advance of the meeting. The Chair will review the TOR and ensure that these are updated on the website.

There needs to be clear timescales around the nomination period prior to the term of office ending for members and that substitutes are from the same representative group. Currently, Schools Forum do need more substitutes. The Chair asked members to think who could substitute for them going forward.

Debby Simpson completed her nomination process to which Duncan Hetherington has been appointed as a Maintained Primary School representative. Jemima sent out communication to CEOs and Chairs for their views on the nomination process and asked if they had anyone they would like to put forward. Helen Crowther (Executive Principle for Greetland Academy and West Vale Academy) and Gemma Falconer (CFO Learning Accord MAT) have been nominated.

John Q: Chair, have we considered the situation of any single academy trust?

No, the MATS and SATS, CEO’s, principles and chairs have been contacted. We need to understand how many SATs we have as opposed to MATS so that there is proportional representation. I know Dan Burns is representing a SAT however there needs to be clarity and understanding on how many SATS are represented.

5.Exclusions Funding Clawback

Calderdale is currently 140 out of 152 LA’s for permanent exclusions and suspensions however, Dafydd wanted to highlight the positive work and great support he has seen in schools over the last 8 months resulting in permanent exclusions currently being down by 25%. The key theme that runs through the report is to change how the exclusions funding clawback is implemented and how young people can be supported across Calderdale. The proposal outlined in the report is once funding is clawed back; this will follow the child into their next provision when their statutory day 6 provider comes to an end.

Dafydd asked members to note table 3 which shows that in 2023-24 the number of children permanently excluded was high, including KS1. This year, the LA have used a small amount of the clawback to support those in KS1 and KS2 who are at the risk of permanent exclusion resulting in no KS1 permanent exclusions in Calderdale. Dafydd intends the LA to drive the process around reintegration and set a new culture of inclusion and support outlined in his recommendations which he asked members to draw their attention to.

Q Stuart: What is the rational between the different fixed costs for primary and secondary schools?

In terms of primary and secondary, considering what we know nationally and what we know currently in terms of Calderdale, in table two there is a significant difference between the number of exclusions across both phases. You can see that 80% of the financial clawback comes from the secondary phase. I think there a lot of factors to consider such as Calderdale not having an allocated KS1 provision meaning we've got to consider the differences between a school with 50 students compared to a school of 800 students. Based on the kind of the financial implications that we've got from a pupil funding point of view, there's a significant higher amount of funding linked to secondary.

Q Chair: The table is not a true reflection of what each child receives as not everyone receives free school meals etc. One of the issues is the average amount of funding per pupil, whether in a primary or a secondary, is significantly lower than this table would indicate. At a quick glance its indicated that it's just over £6k for both primary and secondary.

Can you clarify the AWPU plus the Pupil Premium for 7 – 9 years will be £5361.39 plus £1075?

Yes, that's correct, and the table is to indicate the funding formula of what the LA could take back for a child that is permanently excluded such as the funding element for free school meals.

Q Phil: Just to clarify, you would not take a full year's funding if a child was permanently excluded after Easter for example, it would be pro-rated? In terms of values in terms of the charge, in my experience it has always been a higher amount for secondaries mainly due to the economies of scale that secondary schools work under. There are other LA's within our region who are exploring charging up to £25k per place for a secondary child. The amount proposed here feels proportionate and fair.

Yes, it would be pro-rata depending on where the exclusion lands in the year and what we get from a funding point of view. It is rare to see permanent exclusions at the start of the school year but there seems to be pinch points within the year which appear to coincide with the funding model.

Q John: I understand the principles and wanted to know if you have you spoken to secondary school heads and what was the view from them about the proposal?

I attended CASH on Friday however the proposal was not covered in detail, but secondary heads were informed that the paper was being submitted to Schools Forum.

Q John: Is this process being proposed more widely applied across England by the majority of local authorities?

Jemima answered yes this was certainly the case in my previous local authority which has been applied since 2018, and I know this is the case in other regional authorities.

Q John: While I applaud the principes of reintegrating more children back into mainstream, how practical is this in reality?

I have been working closely with Phil this year around the processes of when children are ready to return as historically, children have been attending AP for longer than necessary. When children display the behaviours of being ready to go back to mainstream, there needs to be a more proactive approach. I am focusing on the Tier 1 provisions, particularly in secondary schools for those children who are struggling with mainstream by placing them in a Tier 1 internal provision within the school for support. This requires vital change to the system currently in place. At Fair

Access, children will be brought to the panel who will be reintegrated back into mainstream and not receive any additional funding for support but will be expected they access the school the same way other children do.

Phil explained Bradford and Kirklees have issued penalties for permanent exclusions for a long time which was around £6k. He explained the biggest challenge he faces that the children who go to TWAPA settles and can achieve meaning they do not want to leave which can lead to some challenging conversations.

Q Stuart: Can I ask about the transition and permanent exclusions that come between primary and secondary what the funding would look like? For example, if I was taking two students into my secondary school in September but they were permanently excluded in primary, is that funding still following that child and you won't be able to claw that back or are you clawing back from the year before?

Yes, it will still be clawed back in the same way. In primary it would be clawed back if we get to the point where the child would stay at TWAPA until year 6 then in year 7 they move to secondary school, the funding will follow the child. The funding would follow the child as normal. There is a key piece of work to be done around preventative measures and having a key adult to support.

The Chair commented that she is happy with the proposal however not with the £8k and 10K without having the additional information to tell her on average that this is the funding for those children who are becoming excluded. She would like an average figure and wants to know that these figures are representative of what had been the case in the past. Dafydd advised that when looking at the current process in place, this can be difficult as there are a variety of different amounts being charged at different levels. Having a set amount for schools will help support them with their budgets to help with consistency.

Q Chair: Finally, on a technical issue, is this something Schools Forum must approve? Jane have you any views on this?

Technically I don't think it is a matter for a School Forum decision as legally the LA can apply it however, I think we are consulting with Schools Forum and asking for a vote as there is a change to the process. However, the LA does have a legal right to deduct from the school budget share for any permanent exclusions that is set out in the in the legislation. It is only the methodology that is being amended to help Calderdale be in line with other LA's.

Concerns were expressed that CPHA had not been approached for their view on this and that those schools with worse budgets would take a particular interest in this. Phil confirmed this hasn't been formally presented at CASH either and that he feels most heads would say no to the model. Debbie disagreed and felt this wouldn't be the case and the decisions would be made around what's best for a pupil to provide the very best support. She agrees the money should follow the child.

Dafydd clarified the plan is not to send a bill to a school but is suggesting there is a fixed amount of money so every school leader knows the financial impact of the permanent exclusion and that the money will follow the child to the next setting. Jane advised the money does currently move with the child if they return to mainstream school, but it will be a significantly less amount due to being in TWAPA. The LA can only give a pro-rata amount back which is not a big enough caveat for schools to take on.

The Chair asked for members to vote on the recommendations. The first recommendation is a fixed tariff is agreed, £8k for primary and £10k for secondary to be implemented from September 2025.

Q Alice: Does it have to be from September 2025? This is very soon and headteachers haven't been informed of the change. Could it start later once there has been chance for feedback? The next CHPA is in September so I will make primary school heads aware of the change.

Response :-I cannot see it being an issue to change the date, it was agreed to start from the new academic year.

Q Adam: what is the reasoning behind why this isn't termly because schools will have spent the money on a child up until that point? Why isn't it split proportionally across the terms in the year?

I believe that's because this is what the LA currently do now. We are seeing a lot of exclusion at a certain point in the year therefore, we want clawback more frequently across the year to allow schools consistency within their budgets.

Q Chair: Can you just explain Dafydd what you mean by three times a year?

Currently at the end of the academic year, Jane for example, will send an email to a secondary school that have permanently excluded three pupils and the LA need to clawback X amount of funding for them. Normally, this leads to a lot of long conversations around the amount of money, the right dates etc. Dafydd is suggesting, that at the end of the first half term, Jane contacts the school explaining they have permanently excluded X number of children and this is the amount that will be clawed back from them. This will be done at the end of each term rather than at the end of each academic year.

Vote to implement recommendation 1 from 1st November 2025: 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 exclusion.

Approved: 8

Opposed: 0

Vote to approve recommendation 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.

Approved: 8

Opposed: 0

Vote to approve recommendation 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.

Approved 8

Opposed: 0

Dafydd agreed to take the model for money following the child to CPHA and CASH, but not for approval, for information so all heads are clear about the process and the budget implications for excluding and for reintegration

6.Central Services to Schools Block (CSB) contingency - options paper
The report relates to the underspend on the Central Services to Schools Block and the underspend of staffing in central services due to unfilled post etc. The underspend can be distributed to school clusters; school improvement or it can be used as reserves. Consultations have taken place through the clusters and around 24 proposals were received back on how the money could be spent. Jemima and Karen Hackett have collaborated on the findings by working with the cluster leads and it was felt the proposals could be split into 3 separate areas:

- For the money to be split through the clusters, using each cluster to identify their proposals
- To spend small amounts on training, the framework and a curriculum review
- Support for schools who are rated as green and to provide an additional half a day per year for support.

John made Schools Forum members aware that he has a significant interest in this item due to being a member of the Partnership Board and head teachers' wellbeing is a topic of considerable discussion.

Q Alice: Is there a proposal around improving head teachers' wellbeing? Can this included in this proposal? There is currently nothing in place to support head teachers' wellbeing at work.

The LA are working on a Head Teacher Wellbeing proposal and feel this would be a useful resource for the money. Option two would be for training and can include wellbeing and I am happy to take this back and simplify the long list of proposals.

Q Chair: I am unsure of the third option to increase support to one day because I think the money is only for maintained schools meaning academies would not get a share of this, is this correct?

The model we have is for school improvement meaning is it only for maintained schools, but it doesn’t have to be. I have drawn up with paper after conversations with Karen and Michelle Joyce, but I am happy to take this back to officers to discuss.

Q Phil – Head teachers well-being has been discussed as an issue at CASH conference. Can I check, the half a day of support for green rated schools, is this a school improvement day or a wellbeing day?

It is a school improvement day.

Q Steve: would be helpful to leave it in contingencies temporarily if a decision is not reached today and it can be used for something urgent?

Q Chair - As Chair, can I propose that the money is split between the clusters and Schools Forum? If a cluster deems it necessary, the money could be spent on wellbeing, curriculum review and school improvement. Is that the way forward Phil?

Q Phil: Yes, I believe so Chair. Jane, how would this be calculated between primary and secondary schools?

Jane: It is a lump sum to each cluster as they voted not to do it per pupil anymore. Last year it used to be an amount, a lump sum and an amount per pupil within the cluster.

The Chair asked for any more suggestions and concluded this has got to a stalemate. The Chair suggested carrying this item forward as a contingency for when Steve completes his next report and asked members to vote.

Vote to carry forward item 6 as a contingency for the next Schools Forum meeting:

Approved: 8

Opposed: 0

7.Maintained Schools Outturn as at 31st March 2025 and Three-Year Budget Plans

The headlines of the report are balances have increased by £332,000 from 2023/24 to a total just over £10 million. The primary sector increased by £479,000 secondary by £126,000 and the special reduced by £273,000. The LA currently have one school in deficit; 44 schools were in surplus with three holding balances in excess of 20% of their annual income and five holding balances of less than £20,000 or 2% of their annual income. The local authority and Schools Forum introduced a balance control mechanism in 2011 which has been suspended since 2020. Schools Forum members are asked to vote if they wish to continue with the suspension for 2025/26. Currently, the LA have 45 maintained schools, 42 primaries and 3 special schools. 43 schools have received letters approving their budgets for 2025/26. 3 schools are projecting deficit budgets, and these have been written to individually to analyse their budget position.

In summary, the maintained schools are projecting to reduce their balances from £10 million to £6 million by the end of March 26 and 30 schools are projecting to have deficit balances over a longer period of time.

Q Adam: Is there a reason why some/all of the surplus held by maintained schools could not be used to fund the high needs block deficit?

- The LA can claw back excess surplus balances, but Schools Forum suspended clawback for 24/25. Schools Forum can reinstate clawback, but it can now only be on 25/26 balances and would need communicating to maintained schools.
- It is agreed that some schools do have excess balances but so do some academies and we don’t have a mechanism to claw back balances from them.
- Academies have the facility to GAG pool and this is on the increase and topical at the moment.
- Some Hard Federations (which are still maintained schools) pool resources.
- if we did this then it is possible that Schools Forum maintained reps will likely not vote for the 0.5% transfer to the High Needs Block in future.
- A couple of years ago, enquires were made about GAG pooling from other LA’s and it was found that Manchester City do clawback. There is evidence from their Schools Forum report in June 2025 that they still use this mechanism at 31 March 2025. The clawback is small, £226k compared to the DSG deficit of £30.124 million.

Q Adam: Same question about funding teacher pay increases.

Same answer as above. Note, all schools are receiving an additional grant towards the teachers’ pay increase.

Q Adam: Same question for the CSB contingency.

This can be done but Schools Forum members would have to vote on this as they have to agree all CSB expenditure.

Q Adam: It seems obvious that there is excess money the High Needs Block requires. Why can't the money be moved across? I suggest we look at design mechanisms to allow this as this isn't clear.

We are unable to do this for 2024 on the balances as of March 2025 because it had already been agreed to suspend the clawback. We can reintroduce the clawback mechanism if Schools Forum members wish to vote on that tonight. There are ongoing issues around clawback because it only relates to maintained schools, and they feel it is not fair when academies aren't party to the clawback mechanism. We know from the report that a lot of academies have large balances. The LA already take 0.5% of the school's block for the high needs budget. Many schools are forecasting to be in deficit by year three, therefore I don't think the maintained schools will welcome it, but it would need to go out to consultation.

Q Chair: Jane, you mentioned two schools federating in summer and these are pooling their budgets, which schools are they?

St Mary's Millbank and Norland C of E have merged budgets from April 2025 and St Andrews Infants and St Andrews Juniors are merging their budgets from Aug 25.

The Chair proposed that Jane ask those schools with healthy budgets at the end of the 3 years how they are going to spend their reserves which would be in line with the new DfE guidance on reserves around anything below 5% and anything above 20%. There needs to be a process in place for those schools who have a healthy budget to report back to Schools Forum and for those schools who have over 15%, to try and understand how they are spending this money.

The Chair asked for a report to come back to Schools Forum to show which schools are over the 20%, showing their 3-year budget and their projections. The Chair asked members to note the recommendations and school balances as at 31 March 2025.

The Chair asked the maintained school members to vote on a continuation of the suspension of the balance control mechanism:

Approved: 2

Jane will provide the 3-year projection based on the autumn 2025 projections to the Autumn meeting.

8.High Needs Block 2025-26 Monitoring Including Activity

Thanks go to Schools Forum for agreeing the 0.5% block transfer for the current financial year. It is being used again this year to support provisions in schools, through the development of a resource provision and also higher funding for children through exceptional funding requests for Tier 1 and potentially Teir 2 to keep children in mainstream where possible. There is the development on the alternative provision and resource-based provision in the last year. Thanks to Highbury and Withinfields for running their resource provision and to our all our secondary schools for their Tier 1 and Tier 2 provisions. This has provided a nuanced approach around resource provisions for individual or small groups of children in mainstream settings. The LA met with ESFA in May and it proved to be a robust discussion around supporting the LA's ambition in mainstream schools meeting needs. The LA need to resubmit figures by the end of Summer and a more detailed report will be brought for the autumn meeting. The ESFA are monitoring our spending and scrutinising our Schools Forum minutes. Our largest overspend is independent school places which is why the LA are investing in a resource provision and applying for a free school on the Three-ways site.

Q Phil: There was a high needs deficit recovery group that was supporting and overseeing this. Has there been a meeting recently as I don't recall attending one for quite some time now?

Yes, they are taking place. The head of Internal Audits attends the meeting who advised the meeting to continue with internal, accountable officers and ask the Chair of Schools Forum to attend the meetings as the most appropriate external representative.

Q Dan: In terms of monitoring the spend and exceptional funding, is there somewhere where there is an accurate breakdown for us to view this so that there is transparency?

Yes, Jane can provide an up-to-date projection for 25-26 for the next meeting.

Q Debbie: I wanted to raise there is a general lack of consistency and clarity around the use of the money and how individual APS are being funded and how individual children within the APS are being funded. How has that allocation been made? how are those decisions being made? What has been the impact? We were promised quite some time ago that there will be a review of the allocations in terms of top up for individual children I believe there hasn't been a response. There is a general dissatisfaction at the discrepancy and the lack of consistency in the funding allocations across schools.

Response (Jemima) I appreciate the challenge around the decision making for the resource provision as I wasn't aware that there were concerns so this is helpful for me to feedback. In terms of top up funding, this is something I have raised with the regional group because I want to complete some benchmarking to review top ups for special and maintained schools in consultation with head teachers. Over the summer, I will be focusing on the proposed bandings to create a model and I'll be asking head teachers for their feedback. There is some work to do on the benchmarking against other LA's and special school bandings need to be included as well.

Q Alice: Jane please can I clarify that it was agreed through the CPHA that the 0.5% was to be taken from the school budgets and moved to the high needs block? That was only for one year 2024-25 but you just mentioned two years, as you said 2025-26 but it was only agreed for 1 year?

Response (Jane): For the financial year 2024-25, Schools Forum rejected the transfer therefore the LA contacted the Secretary of State who overturned the decision of Schools Forum meaning we could move the 0.5% in 2024-25. In November 2024, Schools Forum agreed the 0,5% block transfer for the financial year 2025/26. The LA can only do this for one year at a time.

The Chair requested a detailed report for the next meeting.

9.Sufficiency Audit

Jemima provided a verbal update. The Sufficiency Audit is close to being ready and slides were shared with head teachers at the termly head teacher briefing which identified which wards children with EHCP's are living. Jemima has been working with the performance team due to different needs being identified and number of needs growing. The identification of need for children in primary is rising faster than other groups with autism showing as the main primary need. The data is dependent on the LA understanding the numbers of children receiving neurodiverse assessments which come through the health sector. Jemima is completing a project based on past patterns focusing on where children live and the information be broken down by primary need, their age, gender and types of schooling for example, the LA are aware that largest groups of children with a primary need relating to Social Emotional and Mental Health, autism and neurodiversity, are attending independent special schools. Some of this work has informed

The Chair requested the slides presented at the termly head teacher meeting also be shared with Schools Forum members along with the minutes.

10.Any Other Business

Hamish requested a brief discussion on the budget cuts in education, the impact of the unfunded element of the teachers' pay award and how Schools Forum wish to address these issues and work together with school leaders to achieve better funding for education. Hamish drew members attention to the website https://schoolcuts.org.uk/ that has been relaunched recently with new data.

The website has been relaunched and there is concern from unions for teachers pay awards and that it is not fully funded meaning schools are expected to find 1% of the 4% from their existing budgets. Unions are actively campaigning on this, fighting for better funding and better opportunities for children in all our schools. Schools have been dealing with a lot of redundancies and restructures which have been very stressful for staff. The website shows the school and how they have been affected by the cuts. Across Calderdale, there have been £14 million in cuts since 2010-11. It is a useful tool to share with parents and communities.

The Chair encouraged Schools Forum members to look at the website and decide at the next meeting if there is anything we can actively do as a forum.

Suggestion from Adam McNichol - A glossary to be added for acronyms used

Chair: This would probably be a rather long list and it would need constant updating.

Alternatively, the first time an acronym is used in a report it should include the full title with the abbreviation in brackets

11.Future Dates

15 January 2026

30 April 2026

2 July 2026

All meetings will start at 4pm

Venue: virtual Teams Meeting