Schools Forum Meeting

Date: Thursday 23 October 2025
Time: 4.00pm
Venue: Virtual Teams Meeting

Reports

Reports will be emailed to members prior to the meeting. Papers can also be accessed on the Council's website https://new.calderdale.gov.uk/schools-and-learning/schools/services-schools/a-z/schools-forum

Members of the Forum

Primary Heads Maintained x 2	Mungo Sheppard (Ash Green Primary School) 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)
	Helen Crowther (Greetland & Westvale)
	Gemma Falconer (Learning Accord MAT)
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** 3 July 2025

5.	**TOR and Membership** Verbal / Update	**Karen Morley**
6.	**Election of Chair & Vice Chair** Verbal / Decision	**Karen Morley**
7.	**Education Function for Maintained Schools - Health & Safety funding request** Decision	**Lee Broadbent**
8.	**Education Function for Maintained Schools - Governor Support funding request** Decision	**Debby Simpson**
9.	**Pupil Places Report 2025-26** Information	**Joanne Atkins**
10.	**The School Improvement De-Delegation Request (Maintained Schools)** Decision	**Connie Beirne**
11.	**High Needs Block Exceptional Funding Request** Information	**Jemima Flintoff**
12.	**Medical Needs Team Pupil Funding Transfer and Delivery Model** Decision	**Jemima Flintoff**

13. Scheme For Financing Schools (Maintained Schools) **Jane Davy**
Verbal / update

14. Schools Funding Formulae 2026-27 **Jane Davy**
Information

15. De-Delegation for Facilities Time (Maintained Schools) **Jane Davy, Hamish Heald**
Decision

16. Any Other Business **Chair**

Letter to West Yorkshire Pension Fund re Employer Contributions **Karen Morley**

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.

17. Future Dates **Jemima Flintoff**

15 January 2026
30 April 2026
2 July 2026

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

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

Report to Schools Forum

Item	7
Meeting Date	23 October 2025
Subject	Education Function for Maintained Schools – Health & Safety funding request
Report Author	Lee Broadbent / Paul Greenwood

Report purpose
To seek approval of Schools Forum Maintained schools' representatives for funding for Health and Safety Support Service for maintained schools only for 2026/27.

Need for consideration
N/A

Need for decision
The Local Authority has statutory Health and Safety responsibilities for maintained schools which are funded from maintained school's budgets only, with agreement of the maintained school's members of Schools Forum.

Contact Officers
Lee.Broadbent@calderdale.gov.uk Paul.Greenwood@calderdale.gov.uk

1. Background information and context

The Local Authority has statutory Health and Safety responsibilities for maintained schools which are funded from maintained school's budgets only, with agreement of the maintained schools' members of Schools' Forums.

The relevant maintained schools' members of the School's Forum (primary, secondary, and special,) should agree the amount the local authority will retain.

If the local authority and Schools Forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State.

The DfE has published an operational guide setting out how the funding can be spent.

2026/27 cost of meeting Health and Safety duties: £ 43,500

Statutory duties for Maintained schools:

Compliance with duties under Health and Safety at Work Act (1974) (Sch 2, 70) and other associated legislation.

- Competent advice from the Council's Health and Safety team.
- Ad-hoc visits for monitoring purposes.
- Formal audit and inspection in line with current schedule.
- Accident investigations for RIDDOR reportable accidents.
- Health and Safety policy and appropriate information to manage the school effectively.
- Health and Safety training to meet minimum statutory induction and other training needs.
- Monitoring of fire safety as required by the Concordat between Council and WYFRS and the Regulatory Reform (Fire Safety) Order 2005.

- Support for managing and monitoring the schools Premises Asbestos Management Plan (PAMP) and other arrangements under Regulation 4 of the Control of Asbestos at Work Regulations (CAR 2012).
- Access to Radiation Protection Officer and Radiation Protection Adviser (Secondary only) to satisfy requirements of the Ionising Radiations Regulations (IRR 2017) and CLEAPSS expectations.

The duties outlined above are fulfilled by the Council's Health and Safety team.

2. Main issues for Schools Forum

a) The LA's business planning process identifies the statutory, discretionary and traded elements of each service together with their full-cost so funding can be properly appropriated. To ensure the LA's statutory duties are not subsidised from other funding sources, the costs of support services are attributed in the business planning process. We are therefore confident the services are achieving full-cost recovery.

b) The services, and their estimated costs of meeting statutory duties for 2025/26, are contained in the report.

3. Recommendations

Schools Forum approve the allocation of £43,500 from the Primary and Secondary Maintained Schools Budget for 2026/27 to fund the cost of Health and Safety Support Services to deliver statutory responsibilities for the maintained schools only.

4. Reasons for recommendations

Contained in the report

5. Impact of funding, targets, and milestones

Contained in the report

6. Resource implications

The cost of Health and Safety Support Services meeting the statutory duties for Maintained schools, for 2026/27, is £43,500.

7. Appendices

Appendix 1. Schools operational guide: 2025 to 2026 - GOV.UK

Report to Schools Forum

Item	8
Meeting Date	23 October 2025
Subject	Services for maintained schools - Governor Support funding request
Report Author	Debby Simpson

Report purpose
To seek approval of Schools Forum Maintained schools' representatives for funding for Calderdale Governor Support Service for maintained schools only for 2026/27

Need for consideration
N/A

Need for decision
The Local Authority has statutory responsibilities for maintained schools which are funded from maintained schools' budgets only, with agreement of the maintained schools members of schools forums.

Contact Officers
Debby.simpson@calderdale.gov.uk Steve.drake@calderdale.gov.uk

1. Background information and context

The Local Authority has statutory responsibilities for maintained schools which are funded from maintained schools' budgets only, with agreement of the maintained schools' members of Schools Forums.

The relevant maintained schools' members of the Schools Forum (primary and special) should agree the amount the local authority will retain.

If the local authority and Schools Forum are unable to reach a consensus on the amount to be retained by the local authority, the matter can be referred to the Secretary of State. The DfE has published an operational guide setting out how the funding can be spent.

Calderdale Governor Support Service delivers services to meet the following LA statutory responsibilities for maintained schools only:

UnderS22 (Sch2, 59, Sch2, 79) of the Education Act 2002 to:

a) Provide information and training to Maintained school governors free of charge
b) Appoint parent governor representation to local authority education committees
c) Nominate LA governors to all Maintained school governing bodies
d) Set up temporary governing bodies for new Maintained schools

The LA fulfils the statutory duties, in a) above, by providing access to Basic NGA membership and on-line training, for all Maintained schools. In the 2025/26 academic year this was provided for 40 governing bodies. This remains the same for 2026/27.

The duties, outlined in b) c) and d) above, are fulfilled by the Governor Support Officer.

2. Main issues for Schools Forum

- Schools report high levels of satisfaction about the support provided by Governor Services. The Governor Support Officer brokers the Governor Training offer and provides wider support to school governors regarding headteacher wellbeing and complaints. All elements of the statutory duties are delivered as well as these wider contributions to effective school governance for Calderdale's children.

- The LA's business planning process identifies the statutory, discretionary and traded elements of each service together with their full-cost so funding can be properly appropriated. To ensure the LA's statutory duties are not subsidised from other funding sources, the costs of support services are attributed in the business planning process. We are therefore confident the services are achieving full-cost recovery.

- The services, and their estimated costs of meeting statutory duties for 2026/27, are contained in the report

3. Recommendations

Schools Forum is asked to support the recommended allocation of £17,934 from the Primary and Secondary Maintained Schools Budget for 2026/27 to fund the cost of Calderdale Governor Support Services to deliver statutory responsibilities for the maintained schools only.

4. Reasons for recommendations

Contained in the report

5. Impact of funding, targets, and milestones

Contained in the report

6. Resource implications

The cost of Governor Support Services meeting the statutory duties for Maintained schools, for 2026/27, is £17,934.

7. Appendices

Appendix 1: Schools Operational Guidance 2025 to 2026.

Appendix 1. [Schools operational guide: 2025 to 2026 - GOV.UK]

Calderdale Council

Report to Schools Forum

Item	9
Meeting Date	23 October 2025
Subject	School Place Sufficiency and Planning
Report Author	Richard Morse

Report purpose
A report on how the Authority projects the need for pupil places in order to meet its statutory duty to ensure the sufficiency of school place provision.

Need for consideration
For information and Schools Forum to share any observations.

Need for decision
No decision required

Contact Officers
Richard Morse – School Organisation and Access Manager Richard.Morse@calderdale.gov.uk 07540 671288

1. Background information and context

a) All Local Authorities have a statutory duty to ensure the sufficiency of school place provision.

b) Local Authorities are required to submit complex annual returns which advise the DFE of the capacity that already exists within schools, the Authority's calculated projected need for future pupil places and details of any planned school capital projects which might create additional places. The department analyses this data to decide the level of funding it will apportion to each authority for them to meet any additional need.

c) The level of Basic Need funding awarded to a local authority (i.e. funding that is designated for the use of creating additional school places) is calculated and allocated by the DfE (Department for Education) using a national formula.

d) Levels of Basic Need funding are currently usually announced on an annual basis. It is muted that future funding might see an announcement of a two or three year commitment which makes it a great deal easier for local authorities to adopt a strategic and longer term approach to planning sufficiency.

e) Funding to meet sufficiency comes through two streams – one general Basic Need funding which is intended for Mainstream and/or special and one for special needs which is specifically intended for special needs provision.

Assessing and Calculating the Existing Capacity within Schools

a) The capacity of a school to accommodate pupils is determined using the Net Capacity Assessment (NCA); a formula produced by the DfE applicable to all maintained schools in England. The formula involves carrying out a curriculum analysis (looking at the different use of rooms for teaching) as well as a measurement of the physical space available for teaching purposes.

b) In simplistic terms, every 1.8 square meters of standard teaching space equates to 1 pupil place. Under this formula, individual room capacity is capped at 30 pupil places and in other rooms, such as rooms used for workshop activities or in libraries or I.T. suites, the number is significantly reduced from those used for standard teaching use. The sum total of all places within a school is divided over the number of year groups in order to determine an appropriate admission number for a school.

c) Whilst originally NCA was carried out by local authorities (usually as part of commissioning Asset Management Plans which also include condition assessments), recently the DFE has undertaken these assessments. The process of assessing Special and Secondary provision is now complete and the process of assessing Primary provision is due to commence shortly.

d) These are important because they give a consistent measure of every school's capacity to admit pupils and it avoids any subjectivity in the matter which leads to inappropriate admission numbers being adopted (either too high or low) which has implications for pupil place planning in the broader sense.

Projecting Pupil Numbers

a) The methodology used for projecting future pupil demand varies between local authorities. Calderdale's methodology was originally developed by officers working alongside the School Organisation Committee (SOC). SOCs were part of the machinery of local government and had a role and statutory powers around school planning and organisational issues. Their basis in statute was however repealed in 2005 and SOC's were subsequently abolished with their duties and functions thereafter reverting back to local authorities.

b) The methodology established with the SOC has proved effective and whilst minor refinements have been introduced, this approach to projecting future demand has endured.

c) Each year the NHS trust is contacted to ascertain the number of pre-school children within Calderdale. The data draws together birth data and GP registrations by postcode.

d) Pupil numbers are allocated to the appropriate academic cohorts based on children's ages (school year cohorts run from 01 September to 31 August annually). The current age for children to attend compulsory education is from the first school term that falls after a child's fifth birthday.

e) For Primary School planning, the Authority established 'planning areas' which are broadly based around communities and areas of population within which schools are grouped together on the basis that the majority of local pupils will attend such schools.

f) The anticipated number of pupils due to begin school within each planning area can therefore be calculated up to four years prior to children actually commencing school. Primary school projections are not extended beyond four years as this would entail predicting future birth rates. The assumptions that would be used to predict longer term trends make any such projections unreliable and therefore unsuitable for taking decision around potential closure or expansions. Additional contextual information is, however, available to be used in conjunction with the projections that are available.

g) Area projections are further refined to an individual school level by looking at historical parental preferencing to determine the share that each school is likely to receive out of the total number of pupils entering education. Whilst the number of children in an area can be accurately predicted, individual preferences can fluctuate where one schools popularity changes over another. This might follow the retirement of a long serving and popular headteacher, a good or bad Ofsted report or for any number of other reasons.

h) Once on roll in school, pupil numbers are simply projected forward to the date that pupils are due to transfer to Secondary school provision.

i) As children do not start Secondary school until the age of 11, Secondary school projections can be reliably predicted further into the future (although these could of course change overnight for some of the example scenarios previously described). The methodology uses the number of pupils within the Primary School sector that are due to transfer to the Secondary Sector and factors historical preferencing patterns to predict each Secondary School's 'future share' of the pupil population. Preferencing patterns can change a school's share of the overall pupil population, although the overall total number of pupils feeding into the system is known and can be used as an effective basis for any decision making.

j) The approach to projecting sixth form numbers is under review annually until an effective approach can be established. Historically stay-on rates have been used to estimate the projected number of pupils but the preferencing drivers and high levels of cross boarder movement make this a difficult field to establish any robust figures.

Additional Factors and Contextual Data

a) The methodologies described above provide a core set of data to support decision makers in their considerations as to where additional places may be required or where surplus places might need to be removed. The data set only includes children that are living in Calderdale and registered with the NHS, but provides a stable core starting point.

b) There are variable factors which need to be taken into consideration, some of which can be quantified, others are more anecdotal in nature and need to be considered in a broader contextual sense as they cannot be quantified in any useful way.

c) New housing usually results in the need for additional school places. For the benefit of forecasting, projections are carried out to determine the anticipated additional demand that will arise from housing that is currently under construction. Details of such developments are obtained from the Authority's planning department.

d) In addition to housing that is under construction, there is planning permission that has been granted for housing developments that may or may not be constructed in the future. Such data is available as contextual data but is not included in projections due to the uncertain nature of this data. Longer term contextual data also includes the Authority's 15 year Local Plan.

e) The anticipated additional demand generated from new housing is calculated using an 'average pupil yield' of 0.36 pupils per household. Whilst it is useful to have this data it should be understood that this is an average yield and that in reality the additional demand is likely to vary in different parts of the Borough. Social and cultural differences can influence the number of children that you might expect to see in a new home.

f) Migration is a further important consideration when planning school place provision but by its very nature cannot be accurately predicted or forecasted. There is no prior notification that families may be considering a move into or out of Calderdale and it is often the case that the Authority has to respond to circumstances after they have arisen, once they have become apparent.

g) Projections are revised annually where there is scope to reforecast the need for places and pick up on changes that have occurred since demographic data was originally produced, for example to incorporate changes resulting from inward and outward migration and recent historical patterns.

h) Families of lesser means are likely to move initially into areas where social or private housing is available for rent, or where they might stay with friends or relatives. It is within these areas that the impact of migration is at its greatest.

2. Main issues for Schools Forum

N/a

3. Recommendations

N/a

4. Reasons for recommendations

N/a

5. Impact of funding, targets, and milestones

N/a

6. Resource implications

N/a

7. Appendices

Background Documents
Planning Of School Places 2025 Admissions and school planning | Calderdale Council

Assessing the Net Capacity of Schools:
Net capacity assessment tool - GOV.UK

Latest DFE Scorecard on the accuracy of LA forecasting:
Local authority school places scorecards, Reporting year 2024 - Explore education statistics - GOV.UK

Calderdale Council

Report to Schools Forum

Item	10
Meeting Date	23 October 2025
Subject	De-Delegation of School Improvement Functions (Primary Maintained Schools)
Report Author	Connie Beirne

Report purpose
a) To provide members of the Schools Forum, with possible models of delivery during 2026/27 (1 year) to enable the LA to continue to deliver this statutory function for schools. b) For members to be able to make an informed decision based upon the provided costed models of delivery

Need for consideration
The effective use of maintained schools' funding in securing the local authority school improvement function through a robust and rigorous delivery model.

Need for decision
a) Information is provided to support decision making by Schools Forum about future delivery and funding for the statutory school improvement function Calderdale needs to deliver to our primary maintained Schools causing concern. b) Agreement to de-delegate the funds required from the primary maintained school's budget for 2026/27.

Contact Officers
Jemima Flintoff - Assistant Director: Education and Inclusion Jemima.flintoff@calderdale.gov.uk Connie Beirne - Acting Service Manager for Education Quality and Strategy Connie.beirne@calderdale.gov.uk

1. Background information and context

a) The Calderdale model for school improvement is based on our strong partnership with schools. Through collective endeavour and for the greater good, schools in Calderdale have de-delegated funding to enable the provision of bespoke challenge and support. The school effectiveness offer is tailored to school's individual context and their position on the graduated approach, with intensive support being matched to the most vulnerable schools in order to support rapid improvement. It is through this joint work with school leaders, that the proportion of schools that are good and outstanding in Calderdale has continued to improve.

b) The latest guidance is effective from September 2025. **Support and intervention in schools** This is statutory guidance for local authorities given by the Department for Education, on behalf of the Secretary of State. Section 72 of the Education and Inspections Act 2006 places a statutory duty on all local authorities in England, in exercising their functions in respect of maintained schools which are eligible for intervention (within the meaning of Part 4 of the Education and Inspections Act 2006), including those in a category of concern, ('requires significant improvement' or 'special measures') and 'stuck' schools (schools which have met the coasting definition), to have regard to any guidance given from time to time by the Secretary of State. It sets out the factors local authorities and the Regions Group (RG)will consider, and the process they will follow in order to decide the right approach to supporting a school to improve. It is likely that the statutory guidance will be updated following the new Ofsted School Inspections Framework coming into force in November 2025.

c) Based upon our present risk assessment of Green (no concern), Amber (of concern to the LA) and Red (Of high concern to the LA). There are presently (October 25) 32 green, 4 red and 8 amber-maintained schools, including 4 schools with new headteachers. (12 in total needing additional support) There is an increased level of support for amber schools at up to three days allocation of support per term and for red schools up to four days of support per term. Having excellent relationships with our schools, means that 65% of primary schools completed their own school self-assessment sharing an honest appraisal of where their school was at and what, strengths, challenges and sharing of good practice they were in a position to offer.

d) Risk assessments of all our schools (maintained and academies) are fluid and this means that following support from our SE team members or an Ofsted inspection, discussions with Cluster Officers, CEO’s and/or the Diocese, risk ratings can alter. This will be agreed between the LA, headteacher and chair of governors at the school. It is important, that there is flexibility within our model, as schools can sometimes face issues around leadership/staffing/governance with little notice, and we need to be in a position to offer the support required in a timely fashion.

e) The very small School Effectiveness Team is made up of a Service Manager, a part time School Effectiveness Officer, a Business Support Officer and six School Effectiveness Associates – two are existing headteachers, another three are retired heads who have led our schools previously. The remaining one is a consultant who has worked in the LA and with our schools previously. All are highly skilled with considerable experience and expertise between them. There are four Ofsted inspectors in the team. This has been recognised and appreciated by those heads, whose schools are of concern and by other staff in our schools attending the primary Subject Leader development programme, the New Headteachers network and those undertaking the numerous NPQ qualifications.

f) Feedback on the work continues to be very positive. A survey completed by headteachers in July 2025 showed a good response rate and emphasised the high quality of the service, excellent communication and significant impact of the work undertaken with our schools. Last year, as evidenced from our work, there continued to be an improving picture across Calderdale with forty-two maintained schools judged Good or Outstanding by Ofsted at their most recent inspection, and only two requiring improvement. We are successful as we:

- provide a consistent associate to work with a school,
- work in partnership providing rapid support to secure improvement
- enable all the support to be tracked through ‘Team around the school’ meetings, which is beneficial to all involved.

g) Over time we see numbers of schools which require high levels of support reducing, as schools continue to move from the risk assessment of amber/red back to green as well as a small number of schools joining a MAT. In recognition of this, during the year, further work will take place to review the costs and offer ahead of financial year 2027/28.

h) Calderdale performance outcomes 2025 remain strong with Phonics results continuing to be above national and KS2 results just below national but a 3.1% increase from last year.

i) The SE Team works closely with Kirklees and Calderdale Teaching School Hub (C&KTSH) as well as the curriculum hubs of English, maths and music and our research school. The overview of effective practice means that associates are often able to match highly effective practice to schools’ improvement needs and thus facilitate valuable school to school support. We continue to respond to queries from our academies and offer signposting to those, particularly in difficulty. Support, training and advice also comes out of the successful cluster model in place in Calderdale where funding is provided for both academies and maintained schools to work in partnership. This SE associate model also sits well with the School Improvement (SI) cluster model which all schools benefit from. The cluster model continues to play a significant role in delivering School Improvement on behalf of the LA. Real strength and impact continues to be seen through the impact cluster reports shared with members of the School Improvement Partnership Board.

j) Our highly successful Primary Subject Leaders Development Programme, funded directly by our schools, continues to be delivered by existing Headteachers, including some SE Associates from within the borough. This supports and reinforces the system leadership model of providing school to school support. Following feedback from primary headteachers, we would like to continue the sharing of good practice across Calderdale as workshops. The SE team are planning these sessions to run in the spring term 2026, with our school leaders showcasing this work.

k) Two School Effectiveness Associates (SEA) working as part of the team continue to deliver the new Headteachers support package/network/mentor for up to 19 headteachers including 8 Secondary headteachers, autumn term 25 onwards, which is now funded by school clusters. Feedback so far from new heads, is incredibly positive and they can access the immediate information and support necessary. Headteacher wellbeing also features within our primary school clusters' priorities. Nationally, more than 1 in 4 primary school leaders and more than 1 in 3 secondary school leaders leave within five years of appointment. (NAHT April 2024) The development and implementation of our 'Calderdale Headteachers Health and Wellbeing Strategy 2025-28 will help to continue this important focus on our Leaders.

2. Main issues for Schools Forum

Need for consideration

a) The effectiveness of the offer has been demonstrated by the continued improvements for vulnerable schools and feedback from school leaders and governors. We are presently at 95% good and outstanding schools compared to national at 90%. Ensuring schools remain at least good enables leaders and governors to be masters of their school's destiny, enabling them to make decisions about whether to remain maintained and to make choices if they wish to convert. Schools which are less than good under the current **Support and Intervention in Schools guidance,** are likely to face intervention from the newly appointed RISE teams or sponsored academisation where choices about which trust they choose sit with the DFE.

b) A School Effectiveness options appraisal exercise has been undertaken. The existing team continue to bring in traded income through Headteacher performance management, data agreements, commissioned work, cluster officer post and school reviews. However, despite this amounting to around **£61,335,** much of this is spent on staffing and the monitoring and moderation statutory assessment duties. The team will continue to publish this School Improvement offer for 2026/27, which is open to all Calderdale schools.

c) The available budget for the School Effectiveness team in 2026/27 is £61,335 and includes:

- **£39,335** LA base budget - the local authority is unable to increase this, in line with most councils' resource for children and young people is not matched to escalating service demand.
- **£22,000** traded income based upon our previous year's income.

d) Last year the amount per pupil for our primary schools was agreed at £27.93 **(Model 1)** At the time of submitting this report we can only provide a provisional amount as Finance await further information in December 2025. This is based upon 8,236 pupils as per the latest forecast from numbers on roll as of 26 September 2025. We will be able to confirm these costs at the meeting in January 2026 but using provisional figures:

- Model 1 = £26.40 per pupil
- Model 2 = £24.80 per pupil
- Model 3 = £24.26 per pupil

e) Staffing costs will rise in 26/27. A 3% increase in costs in 26/27 for NJC and Hay grade posts have been assumed. Soulbury grades have not yet been approved in 25/26. The proposal is currently at 5%. Finance have added this to the 25/26 rate and then assumed a 4% increase for 26/27 as these grades appear to get a higher percentage increase when compared to others.

f) **Equalities impact statement**. Ensuring all children can attend excellent local schools is a key element in improving equalities. Education is a strong determinant in health inequalities and achieving good educational outcomes enables children to move forward with healthier lives. Strong and effective schools provide effective support to children who have additional needs or wider barriers to learning. Inclusive schools promote diversity, respect and a sense of belonging, linking to all our Calderdale communities.

3. Recommendations

a) During Autumn Term 2025 and Spring Term 2026, we were awarded funding to provide one day of support to our Green maintained schools (35). This has been successful and Headteachers have valued this support. We have attempted to make the support provided be-spoke and this has been appreciated. Although it is to be noted that Green risk assessed (32 at present), schools can become vulnerable due to changes in leadership, Ofsted grading, staffing, safeguarding etc.

b) In the three following options, the costs of the central team remain fixed - Service Manager for Education Quality and Strategy (£87,401.91),0.6 SEO (£55,937.46), full time BSO (£36,794.69)

c) Suggested **model 1** for delivery April 2026 – March 2027 (1 year)

- Red schools to get up to 4 days of support and amber to get up to 3 days of support per term (£81,000) and maintained green schools (32) x 1 day support across the academic year (£17,600).

Total costs = £278,734.06 (LA amount = £61,335) (**amount requested to be de-delegated = £217,399.06 by Schools Forum)** This is a reduced amount to last year by £39,573.94

d) Suggested **model 2** for delivery April 2026 – March 2027 (1 year) (reduced support to Amber schools, remaining the same for red and green schools)

- Red schools up to 4 days of support per term and amber schools reduced to 2 days of support per term (67,800). maintained green schools (32) x 1 day support across the academic year (£17,600).

Total costs = £265,534.06 (LA amount = £61,335) (amount requested to be delegated = £204,199.06 by Schools Forum) This is a reduced amount to last year by £28,518.94

e) Suggested **model 3** for delivery April 2026 – March 2027 (1 year) (no green schools support)

- Red schools up to 4 days of support and amber to get up to 3 days of support per term (£81,000)
- NB if this model were to be chosen, green schools would need to receive their required support via the SI cluster model arrangements as detailed in the partnership framework document – October 2025.

Total costs = £261,134.06 (LA amount = £61,335) **(amount requested to be delegated = £199,799.06 by Schools Forum)** This is a reduced amount to last year by £38,473.94

4. Reasons for Recommendations

a) For School Forum members to recognise the successful delivery of the LA school improvement function during the last four academic years 2021 through to 2025, involving a smaller number of officer input as well as SE associates and look to continue to support and fund this work going forward into 2026/27 to provide the stability needed for our schools causing concern and address our statutory duties. Members are able to see with the reduction in funds being requested, the impact of the team's work year on year, ensuring our schools are Good/Outstanding across all the areas of inspection.

- In choosing **model 1,** there is the same level of support currently provided for our maintained schools causing concern with a continued offer to our green schools.
- In choosing **model 2,** the schools causing concern continues to be the focus of the team's work but there would be a reduction by one day's support per year for amber schools. Green schools continue to get one visit per year.
- In choosing **model 3,** there is the same level of support for our schools causing concern without an offer to our green schools.

b) School Forum members will need to consider the changing educational landscape and the need to work in partnership with all stakeholders to deliver the best education for all the borough's children. The risks implicit in removing the support for green schools is that the evidence that supports the school's self-evaluation is not seen and as a result some schools may be more at risk of decline. Additionally, some of the best practice in these schools will also not be seen, meaning that the team will be less able to broker school to school support by matching excellent practice in one school to development needs in another.

c) To ensure that all providers are available to support our schools, it is recommended that schools Forum consider **model 1** so we can continue to move enable Calderdale children to attend excellent local schools, having their individual needs met, and achieving their full potential.

5. Impact of funding, targets and milestones

For a decision to be taken on a chosen model, so the necessary changes, required can be put in place ahead of a 1 April 2026 start date.

6. Resource implications

All professionals, funding and resources to be in place by 1 April 2026 for the summer term onwards.

7. Appendices

Report to Schools Forum

Item	11
Meeting Date	23 October 2025
Subject	Exceptional Funding Process and Breakdown of Spend
Report Author	Jemima Flintoff

Report purpose
To provide information requested by Schools Forum regarding the exceptional funding process and expenditure

Need for consideration
Information only

Need for decision
n/a

Contact Officers
Emma Ingham Emma.Ingham@calderdale.gov.uk Jane Davy Jane.Davy@calderdale.gov.uk

1. **Background information and context**

a) Purpose

In Calderdale we are passionate to improve the experiences and outcomes of all our children and young people, and especially those with additional needs. We want to ensure more children and young people achieve and thrive in the communities where they live, being visible and valued; feeling a sense of belonging; having their additional needs met in local schools and making friends in their local communities. To enhance provision and support children to remain in their local schools, we established an Exceptional Funding Request (EFR) process. The purpose of the EFR is to:

- Enhance provision for children and young people with SEND and complex needs.
- Ensure schools have sufficient SEND funding to meet changes in demand.
- Support children having their needs met in mainstream without the need for an Education Health Care Plan (EHCP).

b) EFR applications are considered by a panel, schools submit an application with a wide range of supporting information including current provision, need for further funding and anticipated impact. These are considered by the Exceptional Funding Request Panel (EFRP), which considers

- Innovative support for cohorts of pupils in mainstream settings.
- Cases where the notional SEN budget is significantly mismatched with actual SEN support costs.
- Schools with a disproportionate number of pupils with SEN or specific needs which is not captured by current formula funding.
- Whole-school approaches to inclusion and SEN support.
- The school's wider finances and the expected benefits of any projects or request to the children and families

c) The EFR Panel meets half-termly and includes Calderdale Council's Service Manager for SEND & Inclusion, Finance Officer, Specialist Inclusion Team

representative, two school SENCOs, and the SEND Navigator representing parents.
Schools make an application which is considered by the panel and then relayed back to the school within 7 working days.

d) The funding for agreed exceptional funding requests was largely sourced from the Schools Block Transfer of 0.5% in both 2024/2025 and 2025/2026, however some use of High Needs Top-Up funding has also been used.

e) Calderdale Council will not be seeking to request a Schools Block Transfer for 2026/27 so the funding and process for EFRs will need to be reviewed as it is not explicit in the current funding model. As part of this, a review of the impact, both on the experiences and outcomes of children, and of the impact on reducing the escalation of needs that results in high-cost placements will take place over the coming months.

2. Main issues for Schools Forum

In 2024/2025, 34 settings made an Exceptional funding request, 21 applications were approved. Of these 21 schools, some were for additional top up funding to meet a significant or changed need that wasn't reflected in their current Top Up or Notional. Five were to create internal SEND provision that would support children with EHCPs who would ordinarily have been attending a special school and children on SEND support. In 2025/2026, 19 schools have made successful EFR requests, a small number of these have been to extend provision initially developed in the first round.

3. Recommendations

Calderdale recommends that:

- A specific funding allocation within the High Needs Block is proposed to meet exceptional circumstances/provision development, when the High Needs allocation for 2026/27 is considered.

- Schools Forum considers the outcome of the full evaluation when this has been completed
- Following the full evaluation, the updated EFR process is shared with Schools Forum

4. Reasons for recommendations

a) In Calderdale, our shared ambition is for children and young people with SEND to feel a sense of belonging and to thrive in their local schools and communities, making and keeping local friendships. The national policy direction, and reforms through Ofsted and the planned National Curriculum review all point to a national shift towards greater inclusion. This is better for children and their families, reducing long journeys, enabling deeper understanding and widening participation, and improving equalities. Utilising the 0.5% Schools Block Transfer has enabled the Local Authority to create SEN provisions in local schools. Early feedback from schools and families is incredibly positive, with families keen to keep their children in their local schools once settled.

b) Significant benefits are seen through increased staff confidence and expertise through the development of provision through the EFR programme, this has been supported by the Specialist Inclusion Team and the valuable outreach support of the Specialist Provision Cluster (SPC). Improving staff confidence benefits the wider school population with more staff having greater knowledge of approaches to meeting children's additional needs, which strengthens capacity in addition to the SENCo.

c) The use of Exceptional Funding to create the conditions has slowed the number of children moving into specialist schools and has increased parental confidence about their children having their needs met in mainstream, with or without an EHCP. As well as being vital to improving children's and families' experiences, this work has been a key strand in our mitigations against the cumulative High Needs overspend. Alongside the High Needs costs, children attending specialist settings may have long journeys to school, extending their day, creating additional pressures on families and the environment and creating high costs for transport budgets.

5. Impact of funding, targets, and milestones

a) The total EFR expenditure for 2024/2025 was £549,391 for 41 children. The rest of the 0.5% Schools Block Transfer was spent on new Additional Resourced Provisions (ARPs), establishing an Alternative Provision (AP) in secondary mainstream, and additional top-ups to meet increased demand in primary and specialist maintained schools. In total, the 0.5% Schools Block Transfer was £962,675 was and £983,742 was spent.

b) In 2025/2026 the EFR spend is expected to be £1,732,434 for 149 children, which exceeds to 0.5% Schools Block transfer. The development of provision resourced by this spend will enable up to 108 children with EHCPs to remain in their local mainstream schools in inclusive provision across the borough.

c) School Forum will be aware due to rising numbers of children with an EHCP our maintained special schools are at capacity and the only other option for some of these children would be independent specialist provision (ISP). Based on a conservative estimate including the EFR costs, this approach, enabling children to have their needs met in their local mainstream schools, has saved the Local Authority around £3m per year going forward for those children who have not moved into ISP placements.

6. Resource implications

a) In 2024/25 the 0.5% Schools Block Transfer totalled £962,675. This was spent on EFRs, new resource provisions, 1 new Alternative Provision (AP), additional top ups for schools with high proportion of children with an ECHP and additional resources for special schools increasing capacity

b) The 0.5% Schools Block Transfer in 2025/2026 has been used for the development of Tier 1 and 2 and also some EFRs.

c) In 2025/26 the 0.5% totalled £1,012,024. The cost of Exceptional Funding Requests so far this year has exceeded the 0.5% Schools Block Transfer but can be seen to have had a significant impact on reducing the trajectory of further escalation of the High Needs deficit.

7. Appendices

Schools developing provision though additional EFR funding

Appendix 1

Schools accessing funding through the EFR process and developing alternative provision including through the 0.5% Schools Block Transfer:

ERF SEN funding
Abbey Park Academy
Ash Green Community Primary School
Barkisland CofE VA Primary School
Beech Hill School
Bolton Brow Primary Academy
Christ Church Pellon CofE VC Primary School
Colden Junior and Infant School
Cornholme Junior, Infant and Nursery School
Dean Field Community Primary School
Ferney Lee Primary School
Ling Bob Junior, Infant and Nursery School
Luddenden CE School
Moorside Community Primary School
Park Lane Academy
St Mary's Catholic Primary Academy
The Halifax Academy
Warley Road Primary Academy
Whitehill Community Academy
Withinfields Primary School

Alternative Provision

Brighouse High School

Rastrick High School

Ryburn Valley High School

The Brooksbank School

The Calder Learning Trust

Todmorden High School

Trinity Academy, Halifax

Trinity Academy Grammar (TACM)

Calderdale Council

Report to Schools Forum

Item	12
Meeting Date	23 October 2025
Subject	Supporting Children with Medical Needs
Report Author	Jemima Flintoff

Report purpose
To present to Schools Forum the necessity of changing the funding for the Medical Needs Team in order to ensure the LA can continue to deliver statutory educational entitlement for pupils with significant medical needs who are temporarily unable to attend school.

Need for consideration
This report considers early options for transferring pupil funding from schools to follow individual pupils placed with the MNT. This would then ensure the funding model for children with Medical Needs in Calderdale was in line with national policy guidance.

Need for decision
To agree in principle to the continued development of a model where schools transfer a proportion of pupil funding to the Local Authority when children's medical needs prevent them from being able to attend school. This ensures that the funding follows the child and contributes to the education being delivered during their absence from school.

Contact Officers
Jemima Flintoff Jemima.Flintoff@calderdale.gov.uk

1. Background information and context

Section 19 of the Education Act 1996 mandates local authorities to arrange suitable education for children of compulsory school age who cannot attend school due to illness, exclusion, or other reasons.

Under Section 19 Local authorities are required to make arrangements for suitable education for children who, due to illness, exclusion, or other reasons, would not receive suitable education without such arrangements. This includes both full-time and part-time education as deemed appropriate. The duty applies to all children of compulsory school age, regardless of whether they are enrolled in a school. This includes children who may be out of school for an extended period (15 days or more) due to health needs or other circumstances.

The education provided must be suitable to the child's age, ability, and any special educational needs they may have. Local authorities must ensure that the education is equivalent to that provided in mainstream schools, as far as the child's health allows, and must follow statutory guidance when arranging education for children unable to attend school. This includes considering the role of the child's home school and ensuring that parents and carers are involved in the process.

In 2023 the DFE updated guidance on supporting children with medical needs who cannot attend school. The guidance Arranging education for children who cannot attend school because of health needs sets out the responsibilities of local authorities and schools. The guidance is clear that the costs of supporting children who cannot attend but who remain on a school roll could in part be met by the school through their funding, with the funding following the child.

> *However, where a child remains on the roll of their home school but requires a period of time in alternative provision due to their health needs, the local authority and home school may wish to consider the transfer of a portion of the school's funding associated with that child to the alternative provision. This would ensure that the funding follows the child. This arrangement would cease when the child*

is reintegrated back to their home school or are no longer on the roll of the home school.

In Calderdale, the Medical Needs Team supports children across KS1 to KS4 who are unable to attend school due to physical or mental health issues. The current team comprises 5 centrally funded full-time teachers delivering up to 150 hours of education per week across 39 weeks.

Provision is currently offered through:

- 1:1 home tuition for KS1–KS3
- A proposed central group teaching for KS4 (the Centre)

The current support for children with medical needs is funded through the High Needs Block. In a recent High Needs monitoring meeting with the DFE regarding the deficit, the DFE advised that High Needs funding cannot be used for this function, so from April 2025 this funding is not available.

2. Main issues for Schools Forum

When a child becomes too unwell to attend school for a medically diagnosed reason, but they remain on the school roll, policy is clear that local authorities could consider requesting the money to follow the child. For each school this is probably a relatively small amount of money, as it will be a very few pupils in any given setting. Use of the High Needs Block for this function is not permitted, so Schools Forum is asked to agree a funding model to support the tuition for these vulnerable children. This could be a daily cost to schools, or an agreed formula of pupil funding, which could include FSM and/or notional SEND, to follow the child and enable the medical needs tuition to take place. It is suggested that a further paper, detailing costed options is brought for final decision when Schools Forum have agreed the way forward in principle.

3. Recommendations

Schools Forum is asked to

- Endorse in principle the model of the funding following the child.

- Consider preferred method of funding the support to enable a detailed cost modelling to be brought to the next meeting

4. Reasons for Recommendations

Moving the support for children with medical needs to a ‘money following the child’ model would ensure Calderdale Council is in line with High Needs Funding regulations and improve the equity and sustainability of medical needs education by aligning pupil funding with delivery.

5. Impact of funding, targets and milestones

N/a

6. Resource implications

Not included in the report

7. Appendices

Arranging education for children who cannot attend school because of health needs

Report to Schools Forum

Item	14
Meeting Date	23 October 2025
Subject	School Funding 2026/27
Report Author	Jane Davy

Report purpose
To inform members of Schools Forum the latest proposals for school funding for 2026/27

Need for consideration
Consider and give a view of the proposals for the 2026/27 Schools Funding Formula including the disapplication requests

Need for decision
N/A

Contact Officers
Jane Davy *Finance Manager LMS Team* *Jane.davy@calderdale.gov.uk* *01422 393543*

1. Background information and context

The DfE have delayed the announcement of the funding values for 26/27 from July 25 to Autumn term 25, at the time of writing this report no announcement has been made.

However, the DfE have confirmed the following:

The LA will still calculate local formulae for 26/27 in accordance with the DfE's Operational Guidance (once published).

The schools National Funding Formula (NFF) will use the same factors as the 2025 to 2026 NFF and continue to provide funding protections; minimum per pupil levels (MPPL) and minimum funding guarantee (MFG). They have also confirmed the following:

- Rolling the National Insurance Grant and the School Budget Support Grant (SBSG) 2025 into the 26/27 into the schools NFF.

  i) For National Insurance Grant the funding rolled into the NFF will be the published funding rates

  ii) For Schools Budget Support Grant (SBSG), this will be a slightly different approach due to the funding needs to meet the full year cost of the support staff pay award as well as the part year cost of the 2025 teachers pay award (from Sept 25). The DfE have calculated the new (higher) full year equivalent funding rates from this new total and these cash values will be rolled into the 26/27 NFF.

2. Main issues for Schools Forum

Due to the lack of information Indicative Funding Formula figures will not be calculated for this paper but will provide the rationale that the LA propose to use for the 25/26 funding formula

Funding Factors

The LA propose to follow the NFF funding values if this is affordable within the funding envelope.

Split Site

This will follow the NFF values it is expected that 5 schools will now qualify for basic eligibility funding, 4 schools qualify for the full distance funding rate and 1 school qualifies for a tapered amount.

Capping

In line with meeting the DfE's intention to address historic underfunding and move to a system where funding is based on need the LA propose not to introduce a cap if it is affordable to do so.

Minimum Funding Guarantee (MFG)

It is proposed to set MFG at the highest level possible allowed under the regulations. For 25/26 this was 0%. There has been no indication from the DfE if this is to stay the same.

Disapplication requests.

MFG Disapplication; Local Authorities can apply for disapplication to MFG where application will lead to significant inappropriate levels of protection.

As in previous years the LA will be seeking disapplication for MFG and Minimum Per Pupil Level (MPPL) for the two through schools due to the disparity between the primary and secondary pupil numbers.

It is expected that once the formula is run, Halifax Academy will require a disapplication for MFG but neither school will require a disapplication for MPPL.

PFI factor will be increased in line with the increase in the funding formula for 26/27.

If when running the actual October 2025 data in the formula, any the excess funding will be allocated to the basic entitlement factor for both sectors up to the allowable maximum value, followed by FSM ever 6 and the lump sum. However, if it found there is a shortfall of funding the formula will be adjusted, in the following order;

1) Basic Entitlement to the minimum value allowed

2) Reduce MFG (but no lower than +0%)

3) Introduce capping for gaining schools (except those schools who would gain through receiving MFFL funding).

Consultation with schools

The Local Authority has a requirement to consult with both maintained schools and academies on the changes to the funding formula. There is no planned changes to the funding formula for 26/27

Growth Fund and Falling Rolls Fund

Latest information from Schools access and planning and the SCAT data show that there will be no request to retain any funding for Growth and Falling Rolls for 26/27

3. Recommendations

a) Note the mandatory changes to the 2026/27 funding formula
b) Consider and give a view of the proposals for the 2026/27 Schools Funding Formula including the disapplication requests

4. Reasons for recommendations

The LA have to consult with School Forum and any views of the proposals will be taken into account when calculating the School Funding Formulae for 2026/27

5. Impact of funding, targets, and milestones

Not yet known until the indicative funding has been announced by the DfE

6. Resource implications

All mainstream schools and academies are funded by the Schools Block element of the Dedicated Schools Block. Legislation states that all the Schools Block funded has to be passed onto schools. There will be no call on the Local Authority base budget

7. Appendices

N/A

Calderdale Council

Report to Schools Forum

Item	15
Meeting Date	23 October 2025
Subject	De-Delegation of Funding 2026/27
Report Author	Hamish Heald/Jane Davy

Report purpose

For Forum members to vote on whether funds for Union facilities time for maintained Primary funds should be de-delegated in 2026/27.

Need for consideration

Forum members are required by the DfE operational Guidance each year to vote whether these funds should be de delegated. Appendix 1 shows a request from the teacher unions to increase the base funding.

Need for decision

a) Appropriate Forum members should vote on whether the funds for union facilities time for maintained primary schools in Calderdale should be de-delegated in 2026/27.

b) Forum members to vote on what the union facilities rate should be increased to per pupil for maintained schools in Calderdale to support the work of the unions.

Contact Officers

Jane Davy
Finance Manager LMS Team

jane.davy@calderdale.gov.uk

1. Background information and context

a) The DfE produces school funding operational guidance, and these provide for local authority Schools Forums to annually take a decision on whether specific funds should be de-delegated and retained by a local authority to provide a joint service on behalf of all maintained schools. This arrangement is not applicable to academies, who make their own arrangements, but academies may choose to buy into any centrally arranged joint service.

b) Last year Calderdale's Schools Forum voted to continue to de-delegate funding for union facilities time for both primary and secondary schools (two separate votes). For 2026/27 there are no longer any secondary maintained schools. Therefore, the de-delegation will only be relevant to the maintained primary schools. However, secondary academy members are asked for their views in respect of the per pupil amount to be charged for those schools that opt-in to the arrangement**.**

The Local Authority administers the 'de-delegated' budget, the collection of contributions made by academies, approval, and release of funding to unions or authorisation of any claims, and monitoring of costs and usage of individual union allocations. The Local Authority receives a management fee for this work of £4,000 from these funds. The administration of the TU facilities agreement is currently under review and this management fee is being negotiated to either be removed or be set at a lower rate.

2. Main issues for Schools Forum

a) The union facilities time service being provided here is not the provision of "school" based representatives (such representatives are usually provided with reasonable time within school to undertake such work). This service is for the provision of "local" representatives. The service to be provided by the unions is set out in Appendix 1.

b) Academies and special schools make their own arrangements for union facility time. As of Sept 2025, 36 of Calderdale's academies and 3 Special Schools were buying into the traded service offered by the unions.

All current academies and special schools will continue to pay in. In the last year we are delighted that PALT took the decision to pay into pooled facilities upon forming. Additionally, Crossley Heath, Impact and Family of Learning Trust have all made the very welcome decision to start paying into facilities. This is partly down to the hard work of our trade union officials in lobbying these academies, but it is also a great reflection on the academies' desire to support their employees' wellbeing and ensure best practice is being followed.

LA colleagues have estimated, based on current pay awards that £98k will be required to fund the union facility agreement for 26/27. After taking off the guaranteed academy income for April to Aug 26 and included the forecasted overspend of £6k for 25/26 this leaves £78.7k to be funded by the de-delegation funds and the income from academies for Sept 26 to April 27.

Based on indicative pupil numbers it is expected that if the rates were to be kept at the differential rate that the de-delegation requested for primaries (and invoiced to academy primaries in Sept 26) would be an indicative amount of £4.66 per pupil and the amount to be invoiced to academy secondaries from Academies in Sept 26 would be £6.45 per pupil. If the amounts were to be equalised this would be a flat rate of £5.12 per pupil.

We are taking an increasingly harder line with academies who have stopped paying in to the arrangement and have changed our 'opt in' agreement to an 'opt out'. If academies wish to opt out, they must now demonstrate how they are fulfilling their legal responsibilities, which will help us to pressure them to pay in, as we know that many of them currently aren't. Some MATs have had to adopt the Lead Rep model, resulting in increasing costs and disruption within the workplace. The increase in the number of academies paying in reflects the success of this approach.

c) The total de-delegated budget, plus academy income, is then earmarked as an allocation for each union and allocated on either an Invoice or claim provided.

d) The Unions are again requesting that Calderdale maintained schools support the de-delegation of the funding for 2026/27 for the services to be provided in the attached paper.

e) Calderdale's Federation of Education Unions have discussed the proposal of increasing the sum available to support the work of the unions through increasing the rate charged per pupil please see attached paper outlining the proposal for school's forum to consider.

f) It will be for primary maintained school representatives only on Schools Forum to vote on whether funding for union facilities time should be de-delegated in 2026/27). It will be important for voting members to represent the wishes of their constituent groups.

g) It has previously been the case that the interested groups of Head Teachers and governors have supported the de-delegation of funding for union facilities time as the view has been expressed that all schools need to work with Unions to reduce the likelihood of costly employment disputes.

3. Recommendations

a) Appropriate Forum members should vote in principle on whether the funds for union facilities time for maintained **primary schools** in Calderdale should be de-delegated in 2026/27.

b) Another report will be brought to the January 25 meeting to all Appropriate Forum members to vote on what the union facilities rate per pupil should be increased to.

4. Reasons for recommendations

To comply with the operational guidance issued by the DfE on school funding.

5. Impact of funding, targets, and milestones

If there is a decision made by the schools Forum not to continue to de-delegate the funding for the Teacher Trade Union Facilities budget this would consequently lead to the collapse of the local Calderdale facilities arrangements as there would be no money to pay for local officers.
It should be noted that arrangements such as this are commonplace and in use throughout the country.

Point 6 in the appendix gives a full explanation as to why this situation should be avoided.

6. Resource implications

The current budget is allocated to schools using pupil numbers in each sector. This provides a funding rate of £4.66 per pupil in the Primary Sector, based on an indicative 8,238 primary maintained pupils. Other funding will be provided by an indicative 6,443 primary and 6,467 secondary academy pupils.

7. Appendices

Appendix 1
De-delegation of union facilities time.
A Joint paper on behalf of the Federation of Calderdale Education Unions

1. Purpose of Document

The purpose of the paper is to provide information as to how the teacher union facilities time has operated since de-delegation was first approved in October 2012 in order that Schools Forum can review that system.
Throughout the document the ‘statistics’ refer solely to the duties carried out by the following unions NEU, NASUWT and NAHT.

2. What does the law require?

There are several pieces of legislation which apply to the provision of facilities to discharge trade union duties. These include the Trade Union and Labour Relations

(Consolidation) Act 1992, the Health and Safety at Work etc Act 1974 and the Safety Representatives and Safety Committees Regulations 1997.

In Calderdale the decision to de-delegate funding in primary and secondary maintained schools, the decisions by a number of Academies to ‘buy-in’ and decisions by a majority of the Special Schools to ‘buy-in’ enables funding to be made available so that facilities can be provided as per the legislation, in those schools which are ‘part of the system’.
These facilities are potentially provided to all the teacher trade unions in Calderdale and are currently claimed, in proportion to declared membership, by (order of size).

3. Schools that do not contribute

However, the local (Calderdale-level) branches of the teacher trade unions are unable to provide legal representation, advice, and support within school hours to their members in schools that do not ‘buy-in’.

4. Trade union duties

The trade union duties that might be undertaken on behalf of members include:

- disciplinary hearings,
- grievance hearings,
- informal capability meetings,
- formal capability meetings,
- sickness absence monitoring meetings,
- terms and conditions of employment,
- consultation meetings on changes to working arrangements,
- investigations,
- termination of employment,
- suspension of employment,
- the duties of employment of a member,
- the duties of employment of a group of members,
- advising and representation with regard to flexible working

- negotiation and consultation, and other procedures, relating to the above matters, including the recognition by employers of the right of a trade union to represent members in such negotiation or consultation or in the carrying out of such procedures,
- consultation relating to TUPE,
- negotiations under TUPE,
- Section 188 redundancy notices,
- investigate member's complaints regarding health, safety, or welfare at work,
- carry out health and safety functions such as investigating potential hazards,
- making representations to the employer on the above,
- representing members in workplace consultations on Health & Safety,
- attending safety committee meetings
- representing members at meetings,
- providing information and guidance to school reps,
- (union learning reps) carrying out 'relevant learning activities',
- facilitating compromise (settlement) agreements.

During the past year the unions carried out on one, or more than one, occasion all the duties listed above. In addition, all the local union representatives with time funded by facility time undertook training during the year.

In addition to the above, the education trade unions have been involved in extensive consultations during the last year with both HR in the LA and other providers on a number of policies and advice. This enables HR providers to be able to offer schools policies which have already been consulted upon with the teacher trade unions. This has the clear advantage that should a school adopt such policies it can do so in the knowledge that it is not going to be 'in dispute' with the trade unions.

5. Scope of Support and Advice

During the past year the teaching unions have provided advice to, supported, and represented members in many maintained schools as well as many academies and special schools that ‘buy into’ the system.

It is worth noting that schools may well be unaware that union members in their school have sought advice from their union as frequently advice consists of telephone calls, emails, or meetings off the school premises. Union advice given in such a way, where it clarifies a member’s rights, entitlements or duties, or resolves a potential dispute without recourse to any school procedure can prevent any unnecessary conflict/dispute in school.

This preventative work constitutes a considerable amount of the casework undertaken by local officers, this being higher in schools without a school representative.

6. The request for continued de-delegation of the facilities budget.

The request from the teacher trade unions is to continue for the year 2026/27 the de-delegation of the trade union facilities budget, as the system of teacher trade union facilities currently operating in Calderdale demonstrably continues to work effectively and efficiently.

In a national context the government recognises that there are significant benefits to both employers and employees when organisations and unions work together effectively to deliver high quality public service. This requires public sector organisations who employ over 49 Full Time Equivalent Staff to publish information relating to trade union usage/spend.

If there is a decision made by the schools Forum not to continue to de-delegate the funding for the Teacher Trade Union Facilities budget this would consequently lead to the collapse of the local Calderdale facilities arrangements as there would be no money to pay for local officers.
Duties currently undertaken by the trained, experienced Local Officers of the recognised unions would then have to be undertaken at a school level by school-based representatives.

This would mean that <u>every school</u> would have to:

- fund the costs of having a fully trained and accredited representative for <u>every union</u>.
- school representatives would need to be trained to a much higher level of expertise than is currently necessary.
- initially each representative would be required to undertake a three-day training course for which they would be entitled to time-off with pay.
- further training would then be required on an annual basis.
- <u>plus, each</u> union would be entitled to appoint a health and safety representative and a union learning representative, both of whom would be entitled to paid time-off to undertake the necessary training.

Following the training each representative would then be entitled to reasonable time-off, with pay, to carry out their duties.

Consequently, all of the above would

- place a considerable financial burden on every school.
- be much more disruptive to the smooth running of schools and to the learning of the pupils, as each time a union representative was required to represent a member in school, carry out a health and safety inspection or carry out their ULR role, this would require the representative to be released from their teaching duties.
- fewer issues would be resolved informally, resulting in a significant increase in costs to schools and workload for school leaders, governors, and LA officers. Disciplinary, grievance and capability issues would be more likely to escalate, with cases much more likely to reach employment tribunals.

The current system of Calderdale-wide representatives on paid facility time means that such disruption, to the teaching and learning, is minimised and is clearly also much more cost-effective.

The efficiency and effectiveness of buying into Local FT arrangements is supported by DfE ‘Advice on trade union facility time’ (2014), as set out below:
The DfE Advice acknowledges the *“efficiency of ‘pooled’ facility time funds and recognises that many academies have bought into local facility time arrangements.”* The DfE goes on to suggest that *“School leaders, employers and managers will … want to consider the benefits of facility time, such as improved workplace relations and early intervention in relation to complaints and grievances.”*

<u>The current arrangements efficiently pool the cost risk to individual schools as well as allowing trade unions to provide more effective support through trained and experienced representatives</u>.

Please note - Union subscriptions are used to provide support to all members of the trade unions at a national and regional level as well as providing legal support where this is necessary. Union subscriptions are <u>not</u> used to provide facility time which is an entitlement under legislation to be provided by the employer.

7. The request for the consideration of an increase in the amount of facility time funding

The current situation

a) Over recent years, the facilities time ‘pot’ had been running at a deficit, something that Schools Forum voted to address by allocating funds to address this situation. There was also a vote to increase per pupil charges to meet the rising costs incurred by wage rises, increased on costs and inflation. Falling pupil numbers are also having an impact on the per pupil costs.

b) Additionally, we’d like to draw attention to the fact that in Calderdale we have tried our best to keep the per pupil charge as low as possible. Calderdale charges less than many neighbouring local authorities, for example these were the per pupil costs last year for: Kirklees - £6, Leeds - £6.15, Blackburn

£7.82, Manchester £5.98. Additionally, Calderdale has so far been setting lower rates for primary schools, whereas most authorities set the same, higher rate across both sectors.

c) In calculating the revised per pupil costs for the coming year we have kept the above points in mind – the need to run the 'pot' without incurring a deficit and a desire to keep the costs as low as possible. There are increased wages and oncosts to account for, so there is a need to ask for an increase to the per pupil costs, but we continue to try our best to keep these as low as possible.

d) The rate of £3.79 per primary and £5.24 per secondary pupil was agreed by Schools Forum last year for the academic year 2025/26.

Our recommendation for this year and moving forward

In order to avoid a deficit, we are asking Forum members to commit to increasing the per pupil amount.

We present two different options – one with different rates for primary and secondary pupils and one where the per pupil rates are equalised.

These rates have been calculated at the minimum 'break even' level. Another option would be for Forum to vote for a greater increase in order to safeguard against unexpected rises in costs/shortfalls in income as the calculations are based on estimates.

Option 1: Different sector rates for 2026/27

Primary Per Pupil Charge: £4.66 (23% increase on 2025/26)

Secondary Per Pupil Charge: £6.45 (23% increase on 2025/6)

Option 2: Equalised sector rates for 2026/27

Primary Per Pupil Charge: £5.12 (35% increase on 2025/26)

Secondary Per Pupil Charge: £5.12 (2% reduction from 2025/26)

Option 3: A suggested alternative for 2026/27

We would be happy to hear any suggestions from Forum on alternative ways to alter the per pupil charges to meet the funding levels for the facilities pot.

Conclusion

The teaching profession continues to be one of the most unionised professions in the country and consequently the recognised teaching unions in Calderdale are able to represent over 99% of the teachers in Calderdale.

The current system of effective representation by trained and experienced local representatives has been demonstrated to be an effective and efficient process and should continue to the benefit of all concerned. It is widely used in local authorities all over the country.

A decision not to de-delegate for a further year would inevitably lead to an increase of costs to the majority of schools and, potentially, to all schools as well as a considerable worsening in ‘industrial relations’ to the detriment of all concerned. Staff welfare and wellbeing would also be negatively affected, further impacting the current recruitment and retention crisis.

With regard to the content of this report, the Calderdale teaching unions are requesting to continue to provide a local level of union representation and that the cost per pupil be increased.

Compiled by the union officers of the Calderdale Federation of Education Unions

Karen Morley

Chair Calderdale Metropolitan Borough Council Schools Forum

K.Morley@TLT.School

West Yorkshire Pension Fund
Response to Funding Strategy Statement (‘FSS’)

24th September 2025

Dear West Yorkshire Pension Fund,

Re: Funding Strategy Statement Consultation – Value for Money Concerns

I am writing to you as The Chair of Calderdale’s Schools Forum. The school’s forum acts as a consultative body on some issues and a decision-making body on others and is predominately involved with the financial aspects of running of all Calderdale schools, including both maintained and academy.

Schools Forum remit includes changes to or new contracts affecting schools. The consultation on the funding strategy and the potential change in the employer contribution rate is therefore in my view of interest to Schools Forum.

The forum is also advised on arrangements for pupils with special educational needs, in pupil referral units, and in early years provision.

A reduction to the WYPF employer contribution rate would enable additional spending on special needs, which is underfunded compared to present needs.

Unfortunately, the length and timing of the consultation have prevented this issue to be presented officially to Schools Forum but will be presented retrospectively so that all schools are aware of the present situation.

Schools’ Forum members are representatives for all Calderdale schools and are made up of school heads, bursars, trustees and governors and therefore have a duty to ensure that every pound spent delivers value for money for our pupils, staff, and the wider community.

It is therefore concerning regarding the high levels of employer contribution rates being proposed in the draft Funding Strategy Statement (FSS), especially given the significantly improved funding position of the West Yorkshire Pension Fund (WYPF) since the last actuarial valuation.

West Yorkshire Pension Fund Advisory Panel - Thursday, 24 July 2025

In writing this response I am aware of the letters presented to the above panel from the West Yorkshire CFO’s and ISIO on behalf of the MAT Collective.

I am fully supportive of the points made in each of these letters and ask that the Advisory Panel consider the representations carefully in reaching a decision on future Employer Contributions.

Value for Money and Use of Public Funds
I am aware that advisors to the MAT Collective, have explained that financial conditions have changed substantially since the 2022 valuation, resulting in a much stronger funding position for WYPF. In this context, one would expect to see significant reductions in employer contribution rates over at least the next three years. Despite this improved picture, all levers within the FSS appear to have been pulled to maintain contribution rates at their current high levels, rather than allowing for a reduction that would benefit schools and the children we serve.

As highlighted above schools are facing serious underfunding and each million pounds freed up from lowering the contribution rate would equate to approximately 38 teaching support assistants, a vital resource to deal with the increased pressures of SEN and vulnerable children within our schools. A reduction in the employer rate would be welcomed by schools to help in alleviating budget pressures, protecting the employment of members of the fund and supporting the local economy.

Given the improved funding position, a reduction is both justified and necessary to ensure public funds are used as effectively as possible for the benefit of our schools.

Governance and Consultation Process
There appears to have been limited engagement with employers before setting the draft FSS.

It would therefore appear to be reasonable to ask that the consultation period is extended to enable employers to respond fully after consultation with all stakeholders.

Conclusion
As a steward of public funds, I urge WYPF to reconsider the approach taken in the draft FSS.

Signed by:
Karen Morley
CA6B4DC52F62412...

Yours faithfully,
Chair of Calderdale Schools Forum

Karen Morley

Copies to

Assistant Director, Education and Inclusion Calderdale MB – Jemima Flintoff

Councillor C Hutchinson Calderdale MB Council

Councillor Chris Pillai Calderdale MB Council

Schools Forum

Work Programme 2025/26

Prepared by

Jemima Flintoff, AD Education and Inclusion

***Reports are to be summarised where possible**

Forward Plan	
Activity paper for HNB every 6 months	January 2026, July 2026

Meeting date	Reports	Officer	Report for:	Deadline for papers to Jemima
23 October 2025	Item 5 - TOR and Membership	Karen Morley	Verbal / Update	**6 October 2025**
	Item 6 - Election of Chair and Vice Chair	Karen Morley	Verbal / Decision	
	Item 7 - Education Function for Maintained Schools - Health & Safety funding request	Paul Greenwood Lee Broadbent	Decision	
	Item 8 - Education Function for Maintained Schools - Governor Support funding request	Debby Simpson	Decision	
	Item 9 - Pupil Places Report 2025-26	Jo Atkins on behalf of Richard Morse	Information	
	Item 10 - The School Improvement De-Delegation Request (Maintained Schools)	Connie Beirne	Decision	
	Item 11 - High Needs Block Recovery Plan	Emma Ingham	Information	
	Item 12 - Medical Needs Team Pupil Funding Transfer and Delivery Model	Jemima Flintoff	Decision	
	Item 13 - Scheme For Financing Schools (Maintained Schools)	Jane Davy	Verbal update	
	Item 14 - Schools Funding Formulae 2026-27	Jane Davy	Information	
	Item 15 - De-Delegation for Facilities Time (Maintained Schools)	Jane Davy Hamish Heald	Decision	

Meeting date	Reports	Officer	Report for:	Deadline for papers to Jemima
15 January 2026	Central Services to Schools Block (CSB) contingency - options paper	Connie Beirne		**12 December 2025**
	Activity paper on High Needs Block	Emma Ingham		