

CALDERDALE SCHOOLS FORUM
23 October 2025 – Virtual Meeting Via Teams

SCHOOLS FORUM MEMBERS PRESENT:

Karen Morley (Academy) – Co Vice Chair
Mungo Sheppard (Primary Maintained)
John Eccleston (Academy Primary Governor)
Stuart Hillary (Academy Secondary)
Hamish Heald (Union Representative)
Stephen Baines (Academy Secondary)
Phil Hannah (Academy AP)
Debbie Sweet (Special School)
Adam McNichol (Academy Bursar)
Dan Burns (Academy Primary)
Louise Downing (Maintained Primary Governor)
Gemma Falconer (Learning Accord MAT)
Helen Crowther (Academy Primary)
David Sheard (Trinity MAT)
Gareth Morris (Primary Governors Maintained)
Duncan Hetherington (Primary Maintained)
Karl Veltman (Post 16 Representative)
Brenda Monteith (Roman Catholic Diocese Rep)
Rachel Harling (Academy Secondary)

OFFICERS IN ATTENDANCE:

Jemima Flintoff (AD Education and Inclusion)
Jane Davy (Finance Manager)
Steve Drake (Finance Manager)
Emma Ingham (Service Manager, SEND & Inclusion)
Joanne Atkins (Senior School Organisation & Access Officer)
Debby Simpson (Governor Support Officer)
Lee Broadbent (Health, Safety and Wellbeing Manager)
Connie Beirne (Acting Service Manager, Education Quality & Strategy)
Amanda Farron (Senior Finance Officer - Observing)
Martyn Stenton (Director of CYPS - Observing)
Kevin Rivett (Union Representative – Observing)

APOLOGIES

SCHOOLS FORUM MEMBERS:

Andrea Dyson (Early Years Rep)
Denise Gwizdak (Early Years Rep)

OFFICERS:

Richard Morse (School Organisation & Access Manager)
Ian Hughes (Head of Legal and Democratic Services)

ABSENT

Schools Forum Members: -
Richard Horsfield (Academy Secondary)

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

N/A

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 governor 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.

Amanda Farron – Senior Finance Officer (Observing)

Martyn Stenton - Director of CYPS (Observing)

Kevin Rivett – Unions Representative (Observing)

4. **Minutes of the Schools Forum held on 3 July 2025**

The minutes of the last meeting were accepted as an accurate record by Schools Forum members.

Matters arising: Gareth Morris raised item 7 on school budgets and balances and asked for clarification if the minutes reflect in year surplus and deficits or at year end deficits, he would like to know specifically regarding the three schools projecting deficits, if they are in year deficit budgets or if they will have end of year deficits.

Jane Davy responded that they are the balances projected as at March 2026. The report that was due to come to this meeting is now being submitted for the January meeting due to Jane not receiving all the information from maintained schools which was at no fault of theirs.

The Chair raised the minutes on the High Needs Block item that LA needs to resubmit figures by the end of summer and bring a more detailed report to the autumn meeting. Jemima advised that the LA continue to work with the DfE and that the format reporting has changed which has unfortunately made matters more complicated meaning the LA have not submitted the final report. The minutes from the last meeting asked for details on the exceptional funding request which has been brought to this forum and a report on the whole of the High Needs Block will be brought to the meeting in January 2026.

John Eccleston commented that the information from the Exclusions Funding report brought the Schools Forum meeting in July, has now been shared with primary and secondary heads.

The Chair informed members that there is a now a glossary of terms on the Schools Forum website and thanked officers for explaining abbreviations for members understanding.

5. TOR and Membership

The Chair highlighted that the membership on the agenda was not entirely correct as it shows there are vacant places for the secondary head maintained, the secondary governor maintained and the secondary headteacher maintained substitute, Calderdale no longer have a secondary maintained school so these positions are not required. These will be updated on future papers and on the website and Phil Hannah's role will be updated to the Alternative Provision representative. The Chair asked forum members for advice on transferring Adam McNicholl from the position of Academy Bursar to the Academy representative position. Debby Simpson advised it is difficult obtaining nominations and would support the Chair in her decision to do this. Adam McNicholl confirmed he would be happy to move to the Academy representative position and to keep the same term of office. This would leave a vacant position for an Academy Bursar however, Gemma Falconer advised that this position would better suit her and agreed to change. The position of Academy Representative (Bursar) which was now vacant due to Ivan Kuzio vacating the position was agreed to be filled by David Sheard, this leaves a vacant position for an Academy Representative to be filled, Debby Simpson agreed to find a suitable candidate on behalf of Schools Forum.

All changes were agreed.

6. Election of Chair & Vice Chair

The clerk asked for nominations for the election of Chair and Vice Chair as Karen Morley's term of office is coming to an end in January 2026. No nominations were put forward for the positions. Karen advised that she was willing to be re-elected her for another term and that she would be willing to then be appointed to the position of Chair. Phil Hannah's term of office also comes to an end in January, and he confirmed that he would be willing to continue in his current role for Schools Forum.

It was agreed that Karen Morley and Phil Hannah are elected for a further term of office,

John Eccleston advised he would put forward the proposal of Karen taking the position of Chair to which Duncan Hetherington seconded. Members agreed with this action. Karen asked for a Vice Chair, Adam McNichol offered to stand as Vice Chair. Members agreed with this action.

7. Education Function for Maintained Schools - Health & Safety funding request

The Chair advised the recommendation is to approve the allocation of £43,500 for 2026/27 from primary and secondary maintained budgets, however Calderdale have no maintained secondary schools. This is a de-delegation to fund the costs of health and safety and the primary maintained representatives are the only ones able to vote on this item.

The Primary representatives voted on the recommendation:
Approve: 3
Oppose: 0

8. Education Function for Maintained Schools - Governor Support funding request

Debby Simpson presented the report and advised that there is a £453 difference to the paper that was brought to the previous October meeting and the number of governing bodies remains the same. The extra funding is an estimate of what NGA are moving their costs to.

The Primary representatives voted on the recommendation:
Approve: 3
Oppose: 0

9. Pupil Places Report 2025-26

Joanne Atkins presented the report and responded to the following questions.

John Eccleston Q: Are you seeing any surprises in your updated forecasts particularly for primary? Are there any significant changes to what we have anticipated around the decline in number of primary school children across the LA particularly in more areas of the LA compared to others?

A: No particular surprises. The numbers are dropping across primary for the foreseeable future which we will be keeping an eye on and re-run the projections again early next year to see if there has been a change in the data submitted from the NHS (which usually comes through at the beginning of January) to see what next year's birth rates and GP registration data looks like.

Gareth Morris Q: Are there primary schools that have admission numbers that aren't based on a multiple of 30 or half of 30?

A: Yes, we have some that have an admission number of 16 or 17. There's a couple of schools that have an admission number of 20. Some of them might have a single age teaching group for reception but then have mixed age teaching groups as they move through the school. I am not fully aware on how they carry out the net capacity assessments, but they do look at how they would organise the classroom accommodating 30 pupils standard class size.

Gareth Morris Q: Are there any larger primary schools that have 30 plus 10 as an admissions number?

A: Yes, if they did admit more than 30, the school would normally organise in such a way that they only have a maximum of 30 children in a class. Some schools who are perhaps reducing their numbers, might have a situation where they have 32 or 33 in a class, but this is not the norm.

Rachel Harling Q: Now that the DfE are completing the NCA assessment as opposed to the LA, have there been any significant differences in terms of any schools where their capacity positions have changed quite significantly?

A: I believe there are a couple of schools where the net capacity assessment has been higher than the original that PAN was set against such as one of the Trinity schools was higher in terms of NET capacity from what their original PAN was set.

Chair Q: The primary trends over the next 3 years are predicted to lose 1294 children and by that time, there will be 23.7% spare capacity in schools. What work is being done to reduce that capacity?

A: The LA have met twice with a group of schools, their governors, trusts, two dioceses and the Lead Member for Children and Young People to focus on a Small Schools Strategy for Calderdale. The strategy will centre on sustainability; the ways schools can effectively share resource and create strong models for survival. Going forward, this can be used as an overall picture of need across different communities so that working together the LA can mitigate the risks for Calderdale schools. There are opportunities in schools with falling rolls, for example developing provision for children with SEND so they can attend local mainstream schools rather than specialist schools far from where they may live. Our aim is to have inclusive learning spaces in most of our school communities. This would help support small schools to be resilient if they're able to take children with special educational needs. Some of these would be satellite hubs, some will be resource-based provisions, and some will be their own inclusion hubs which Emma can provide more information on. The Anglican and Catholic diocese CEO's have been involved in the the work to develop a Small Schools Strategy as they have very small schools in their trusts, and every school with fewer than 100 children were asked to be part of the working group. There has been a focus on localities having different levels of need so there needs to be a systematic approach as we do not want schools to be struggling to the point of failure and a community losing its education setting. There is also the Early Years entitlement expansion which is part of the strategy.

Chair Q: You mentioned that you can predict further into the future for secondaries but the paper that has been produced only shows the 4 years. Would it be possible to do that for the secondaries as it would help with the planning?

A: Yes, I can send out correspondence to the secondary schools just to include the future projections.

Jo Atkins will send correspondence to secondary schools and to the clerk to distribute to Schools Forum members.

Chair Q: Is the NET capacity on the report?

A: No, we have just started collating them all from the new assessments that have been carried out. I can send through the capacity information as well for each school and it has been discussed to also add this to the website for parents and schools.

Chair Q: Are we confident that all schools are aware of this document? I know it is on the intranet, and it is very useful for budget planning.

A: It has been taken to CPHA and has been mentioned at CASH as well as the Calderdale School Place Planning slides which can be distributed to forum members.

Jemima to send the clerk the pupil place planning presentation to distribute to Schools Forum members.

10. The School Improvement De-Delegation Request (Maintained Schools)

Connie Beirne presented the report and responded to questions.

Chair Q: Does a decision need to be made tonight on the delegation?

A: Yes. This is a decision in principle as we cannot approve it until the actual figures are known for the amount per pupil. This is detailed in the October census data which will come back to the January meeting however members asked to be sighted early on what would happen with the school funding formulae.

Chair Q: The paper mentions being awarded funding to support the green schools for autumn term 2025 and spring term 2026. Please can you clarify where this funding is coming from?

A: Apologies, this is a typo and should read 2024-25 as we complete the green school visits during the autumn and spring term.

Duncan Hetherington Q: are there fewer maintained primary schools to “foot the bill”, even though the bill has reduced? Is it going to cost individual-maintained schools more than it would have done last year?

A: On page 6 of the report under section 2d, last year the amount that was agreed by Schools Forum was £27.93. We have had a few schools that have converted to academies since this amount was agreed but you can see that the prediction that's come from Jane and the finance team, it's a reduced amount going forward as there are less schools that need intense support.

Gareth Morris declared a limited interest for Ferney Lee as they have become a green school recently. Based on experience of having received support both latterly in the green category and in the previous category, they found it very useful. The head teacher is very keen on the idea that the model continues to be available for all schools.

The Primary representatives voted to approve in principle option 1 which includes the provision of support to schools causing concern and also to green schools:

Approve: 3

Oppose: 0

Connie will bring Model 1 back to the meeting in January 2026 with the actual figures along with the workings and the financial information on how this has been arrived at.

11. High Needs Block Exceptional Funding Request

Jemima Flintoff presented the report and responded to questions

John Eccleston declared an interest in this agenda item as a member of the special school's cluster. He feels the work is to be commended and supported to provide the right provision near to home in the community. John is interested to see the numbers against these provisions to give a feel on how much impact this would have.

John Eccleston Q: In terms of the committee, how have the 2 SENDCO's and the parent representative been arrived at, can we have some more information about that?

A: The parent representative is our parent navigator role which is appointed through Unique Ways and funded by the Change Programme. The LA went out to SENDCO's networks for an expression of interest to be on the panel. There is also a head teacher that is on the

panel. There is senior management oversight as well from Jemima. We have seen some significant impact within Calderdale families in terms of schooling and homelife.

DanBurns stated that the strategy appears to be coming together and seeing the LA work so hard on this has been great to see, by continuing to work together and sharing that local knowledge of what we've got and what we need will help to formulate the strategy.

Gareth Morris Q: Is there work being done to make these arrangements capable of being supported long term without us having to return for repeat exceptional funding allocations, which won't be exceptional if we're coming back repeatedly as it's going to be hard to maintain this in the long term with the number of staff involved?

A: There is a real need for the LA to review the top-up bandings which is a large piece of work and looking at gaining some support from expertise in the region. We want to make this sustainable and not have to go through transactional bids all the time. We require assurance that demonstrates the provision being developed is meeting the changing needs. We are at the start of a process and there are so many strong cases across Calderdale. The vision is to make sure we have provision spread across schools in all our communities. It is more difficult to comment on the money due to the national position.

Mungo Sheppard commented that there is support from primary heads for the vision of the LA. A good start has been made with the Mainstream Inclusion Calderdale and making sure we have good data to make capacity match the need. Mungo and Debbie Sweet want to work closely with the LA towards the same goal, to work on what's this is going to look like and who's going to quality assure it. The number one priority this year for himself and Debbie is to work with LA colleagues around making inclusion a priority to get a sustainable set of schools within Calderdale that actually have fantastic inclusive ethos for everybody to help meet the needs of children who are care leavers, children who have social, emotional and mental health and communication speech and language needs etc.

The Chair commented that overall, this is a wonderful indication of the progress being made.

12. Medical Needs Team Pupil Funding Transfer and Delivery Model

Jemima Flintoff presented the report and responded to questions.

Chair Q: Can we fund this from the Central Services for Schools' Budget (CSSB)?

A: Unfortunately, we cannot pay for it from High Needs. We have a balance from the previous Central Services for Schools Budget year however the issue is the central block itself is reducing and we will be looking more at funding the things that currently funded from this block in the future rather than spare capacity to fund something which could come from somewhere else.

Chair Q: Will this apply to both maintained and academies? Is the ask to look in principle at the various models?

A: Yes

Helen Crowther Q: Our trust runs a medical needs provision for Kirklees and one of my school buildings is probably going to be the building we're using to run Calderdale medical needs out of. Are we aware of how the other local authorities fund?

A: Some charge a daily rate or an hourly tuition rate. Some charge a proportion of the AWPU (Age Weighted Pupil Unit) and or related funding for that child. If a child is out of school long term, then they've still got an educational entitlement that the school is not providing. The

medical needs team are being proactive at looking at ways that schools can actually provide some of that educational entitlement through the use of the AV robots and to think around how we manage this going forward. This purpose of the report was to sight Schools Forum on the necessity of change from funding it through High Needs and bring a report back to another meeting.

Helen Crowther Q: It has been mentioned in the clusters of medical needs provision is around how many of these children are in receipt of an EHCP and/or pupil premium. For some of these young people, even though the medical needs provision is meant to be a short-term offer, these young people stay a lot longer as there is nowhere else for them to go and the school maintains their EHCP and Pupil Premium funding, is this something you are considering?

A: We are strict on this in Calderdale that the Medical Needs team overwhelmingly do not work with children on an EHCP, as this would then be through their plan. We recognise we have some children that take more time to get an offer or have an EOTAS package but this would also be done through their EHCP.

Brenda Monteith reiterated not confusing the medical need and the Medical Needs team with that funding element. In the local authorities that she has worked with, if the child does not have an EHCP, then the funding follows the child and therefore into the Medical Needs team if the child is being supported by them.

Rachel Harling commented that in principle it sounds sensible, but we need to consider the impact on very small schools, assuming the funding would be budgeted based on the October census information and to consider the impact on small schools if we do make the decision to do this.

The Chair requested that before the paper is brought back to the January meeting, to check if it would be possible to fund this from the CSSB budget to see if this would be an option.

13. Scheme For Financing Schools (Maintained Schools)

Jane Davy presented the report. There are no changes as there were no directed changes from the DfE this year and information can be found on the school's intranet.

14. Schools Funding Formulae 2026-27

Jane Davy presented the report and responded to questions. The LA have not had any published indicative figures from the DfE yet and purpose of the report is keep members informed of the direction of travel. Regarding the request for disapplication, a request has been sent out to Calder Learning Trust and The Halifax Academy. Calder Learning Trust are in agreement with the LA with going for disapplication but there has been no response as yet from Halifax Academy however, no response states that they are happy for this to go ahead. The report asks forum members to note the mandatory changes which are rolling the grants into the funding formulae such as national insurance grant and school budget support grant will be in the baseline going forward for 2026-27.

Chair Q: The way the report is written, it implies 2026-27 will be through the LA, and in future years will this move to a national funding formula?

A: It has been mentioned moving to a national funding formulae for many years. They still have other elements they are dealing with and information on this has gone quiet. They've

given us no indication of any increases other than putting the budgets into the baseline however, that was always the direction of travel that it would be in the national funding formulae.

Members noted

- a. The mandatory changes to the 2026/27 funding formula
- b. The position in relation to the disapplication requests

No objections were raised in relation to the MFG applications for the two through schools and was agreed in principle. A vote will be taken at the next meeting when further details of any impact on all schools will be considered. The Chair asked for detailed information to come back in January once further information is available.

15. De-Delegation for Facilities Time (Maintained Schools)

Hamish Heald and Jane Davy presented the report and responded to questions. The report is asking members to vote on the de-delegation of funding for union facilities for maintained primary schools, and to discuss the differential funding for primary and secondary. A report will be brought back to the meeting in January once there are more precise figures for the rates per pupil.

Chair Q: Are we only asking the maintained schools to vote on this or are we also asking academies?

A: I have been informed that it is only maintained school which can vote. We need a decision in principle that the maintained primaries agree to de-delegate. We didn't think it was fair to set the rate of the secondary amount without a discussion with Schools Forum. Two options have been proposed, one is to continue with the differential rate as normal or one to equalise the rates across the primary and secondary sector.

Chair Q: For the academies, is the charge the same that you would de-delegate for a maintained school?

A: Yes, however it is slightly different for the academies because the maintained year is April to March and it's based on 2026-27 funding for April - March therefore for it to be fair for academies, we don't increase their funding until the September because their rate is September to August. When we do the accounts for the for the Union facilities part of the year is at the old rate for the academies and part is for the new rate so that there is fairness in the funding due to academies funding being behind by 5 months.

Adam McNichol Q: What is the value for money as I cannot see an analysis of the cost-of-service vs the outcomes that are achieved by this. Can you provide any justification of the numbers and outcomes around why you need the money to achieve the outcomes? Have you done any cost analysis and what value you would be getting from this?

A: Unfortunately, I do not have the cost analysis to give you for this. There is a lot of detail in the report, but I agree it's very hard to put a cost on a member off staff being off for an extra month when they could have been back sooner. How can I prove to you that it's my intervention that has been the crux there.

Adam McNichol Q: One of the things I think that would benefit forum is a formal audit of the service to understand the value for money involved. I believe this is a good thing but looking at this from a critical point of view, there is no justification for the costs in terms of auditing for

the next meeting. It would be useful to have some analysis, and do we need to spend that amount of money based on the amount of time spent?

A: We are in the process of creating a new agreement between trade unions and Calderdale in which we are making it clear what we are using to come up with the funding that we are asking for. There is an industry standard of 200 members of a trade union, and the need to have provide an officer with one day's facilities time in order to provide the services that are required. There is a standard formula that is in place and over the course of negotiations over this new agreement this is what it is going to be the basis of.

Rachel Harling Q: What makes up the 23% increase because this is quite significant increase year on year. Especially with more schools buying into the service and when Schools Forum approved the deficit through the Central Schools' Block last year. Could you help me to understand this? If we do agree, we need to be clear when we communicate this to head teachers as this is quite a sharp uplift.

A: Schools Forum did approve the deficit in the Central Schools Block and there will be an in-year deficit again this year to carry forward to fund next year due to us forecasting the teachers' pay less than what it actually was. National Insurance has affected it as well, The Union facilities don't receive any grant, so we have to fund everything. There is a drop in pupil numbers, but the work is as increased. We have had some schools join and but also had a secondary school leave. There have been increases in pay, support staff, national insurance and there are lower pupil numbers. The pupil charge is lower in Calderdale than in surroundings LA's.

Chair Q: If you've got a multi-academy trust that doesn't join and they have to find their own resources, do they require all those people in place in the individual schools, or can they address it as a trust issue?

A: The model generally used is there is a lead representative in charge for the whole academy trust. The individual schools would hopefully have a school-based representative, but they would still need someone at the higher level and not officer level. They would need to complete the training but once they get a new job in a different trust, they would need to repeat the training.

Gareth declared an interest due to formally being an official for NUT. Gareth commented that the main value from working with the local officers of the trade union is knowing somebody with the knowledge around this which is different from a school-based representative who hasn't had the level of involvement that Hamish and his colleagues have had.

Vote for primary maintained regarding decision on de-delegation:
4 approved

A further report will be brought back to the meeting in January.

16. Any Other Business

Letter to West Yorkshire Pension Fund re Employer Contributions

The West Yorkshire Pension fund is in surplus by around 120% therefore, 25 MATS in West Yorkshire formed a "collective" and met with isio advisors. The people within that "collective" have had CPD training on how the pensions information is put together and this has shown

there should be a significant reduction to the employer contribution. The CFOs of the West Yorkshire LA's have also collated something similar. The "collective" have submitted over 150 letters to support a significant reduction based on actual facts from the advisors.

The advisory body for West Yorkshire Pension Fund has met today but a rate has not been set, but there is hope for a reduction. Representations by the LA's may result in the maintained schools contribution being less than the academies. The "collectives" aim is to reduce the employer's contribution so schools don't have to make the cutbacks for Teaching Assistants and staff budgets. A unison representative has submitted a paper to show he doesn't agree with schools due to academies being high risk. The Chair asked if Hamish has involvement in the Advisory Board or any influence around this to please make them aware that schools are willing to have a discussion on this. The Chair of Schools Forum had put a paper forward to WYPF in support of a reduction for not only academies, but for the maintained schools.

Gareth Q: Are you clear that this is a point at which a contribution can be reduced? because if it can, for academies and for local authority schools alike, I'm sure everybody would be quite happy.

A: Very clear. We are in the triennial review period which is the consultation on the funding strategy. Our response has been part of that consultation and now it's for the advisory body, which you will be aware of to review this. It appears that the WYPF advisors are tweaking the components to keep the rate stable. They have said they feel it's better for budgeting if the rate is stable. My view is if it needs to come down, because we've over funded it, we want some money back into our schools, and back into the LA's. We understand that the funding strategy provides for the surplus, to be pay back over 22 years. We want to pay it back over 3 – 6 years. I'm sure there'll be more information eventually as to what the rates are and hopefully it will be good news for all schools whether academy or maintained.

17 Future Dates

15 January 2026

19 March 2026 (Exception meeting)

30 April 2026

2 July 2026

All meetings will start at 4pm

Venue: virtual Teams Meeting

Table of Actions

Item	Action	Officer	Deadline
4	School Balances March 2026	Jane Davy	15 Jan 2026
9	5 year secondary school projections – to schools & SF Pupil planning	Jo Atkins	ASAP

	presentation – distribute to SF	Jemima Flintoff	ASAP
10	School Improvement de- legation	Connie Beirne	15 Jan 2026
11	High Needs Block 2025/26	Jemima Flintoff/Emma Ingham	15 Jan 2026
12	Medical Needs Team pupil funding	Jemima Flintoff	15 Jan 2026
14	Schools Funding Formula	Jane Davy	15 Jan 2026
15	De-delegation of facilities time	Jane Davy/Hamish Heald	15 Jan 2026