

Schools Forum

Date: 30 June 2022

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://www.calderdale.gov.uk/v2/residents/education-and-learning/schools/services/a-z/schools-forum>

Members of the Forum

Primary Heads Maintained x 2

Mungo Sheppard (Ash Green Primary School)

Jo Buckley (Old Town Primary School)

Primary Governors Maintained x 2

Adam McNicholl (Hebden Royd Primary School)

Mary Carrigan (Castle Hill Primary School)

Primary Governor Substitute

James Ratcliffe (St Augustine's Junior and Infant CE (VA) School)

Secondary Head Maintained x 1

Tony Guise (Calder High School)

Secondary Head Teacher Substitute

Gill Shirt (Todmorden High School)

Secondary Governor Maintained x 1

Vacant

Special School Representative x 1

Debbie Sweet (Highbury School)

Academy Members x 10

Karen Morley (Scout Road Academy)

John Eccleston (Warley Road Primary Academy)

Andrew Fisher (North Halifax Grammar)

Julie Kendall (Together Learning Trust)

Dan Burns (Old Earth Primary School)

Richard Horsfield (Brighouse High School)

Brian Robson (Brighouse High School)

Darren Senior (Beech Hill School)

Phillip Hannah (The Whitley AP Academy)

Bill Montague (The Crossley Heath School)

Academy Substitutes

Ivan Kuzio (Trinity MAT)

Emma Casson (North Halifax Grammar)

Roman Catholic

Brenda Monteith (Highbury School)

Church of England

Anne Craven (St John's (CE) Primary Academy, Clifton)

Calderdale Federation of Education

Yvonne Carr (National Education Union)

Staff Unions

Post 16 Representative

Julia Gray (Calderdale College)

Early Years Representative

Vacant

Cllr Adam Wilkinson, Cabinet Member for Children's Social Care and Lead Member for Children's Services. (Observer status only)

AGENDA

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 28 April 2022.**

To approve the Schools Forum minutes.

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|-----|--|----------------------|
| 5. | Elect Chair and Vice Chair | Ian Hughes |
| | Decision | |
| 6. | Allocation of Funding to School Improvement Clusters (half year report) Report | Connie Beirne |
| | Information (brought forward from the 28 April 2022 meeting) | |
| 7. | Spend on High Needs Block Provision, including arrangements for commissioned places for pupils with Special Educational Needs | Paul Tinsley |
| | Report – Information (brought forward from the 28 April 2022 meeting) | |
| 8. | Self-Assessment Feedback | Ian Hughes |
| | Verbal Update - Discussion | |
| 9. | National Funding Formula | Jane Davy |
| | Verbal Update – Decision/Information/Discussion | |
| 10. | Final Balances and 3-year Budget Plans | Jane Davy |
| | Report - Information | |

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| 11. Claw Back Report

Report – Discussion/Decision | Jane Davy |
| 12. Future Delivery of the Local Authority School Improvement Function

Report – Information/Discussion | Connie Beirne/
Paul Tinsley |
| 13. Work Programme

Report – Information | Paul Tinsley |
| 14. Format for future Schools Forum Meetings

Verbal – Decision | All |
| 15. Any Other Business
Questions to be submitted a minimum 3 days prior to the meeting in writing to:
CalderdaleSchoolsForum@calderdale.gov.uk
Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair. | Chair |
| 16. Future Dates

24 November 2022
12 January 2023
27 April 2023
22 June 2023

All meetings will start at 4pm
Venue: TBC | Paul Tinsley |

CALDERDALE SCHOOLS FORUM
28 April 2022 – Virtual Meeting Via Teams

PRESENT:

Brenda Monteith (Roman Catholic)
John Eccleston (Academy)
Julie Kendall (Academy)
Jo Buckley (Primary Maintained)
Adam McNichol (Primary Governors Maintained)
Yvonne Carr (Unions)
Mungo Shepherd (Primary Maintained)
Tony Guise (Secondary Maintained)
Andrew Fisher (Academy)
Richard Horsfield (Academy)
Dan Burns (Academy)
Phil Hannah (Academy)
Mary Carrigan (Primary Governors Maintained)
Debbie Sweet (Special School)

IN ATTENDANCE:

Paul Tinsley (AD Education and Inclusion)
Ian Hughes (Legal Officer)
Lesley Bowyer (Inclusion Adviser)
Richard Morse (Senior Commissioning Officer – School Organisation and Planning)
Jane Davy (Finance Officer)
Steve Drave (Finance Officer)
Helen Smith (minute taker)

APOLOGIES

Karen Morley (Academy)
Julia Gray (Post 16)
Darren Senior (Academy)

1. Substitutes nominated for this meeting and apologies for absence

None.

2. Members Interests

None.

3. Admission of the Public

None.

4. Minutes of the Schools Forum held on 13 January 2022

Minutes approved.

5. Elect Chair and Vice Chair

As we do not have an elected Chair or Vice Chair for this Schools Forum, at the pre-meet held ahead of the Schools Forum it was decided that item 10 would benefit from a decision at this meeting and that a Schools Forum Chair be elected for this meeting only to hear this report. As it is deemed too onerous for that person to Chair the whole meeting, the proposal is that we defer the other papers to the June meeting.

Ian Hughes asked for a volunteer to Chair this meeting. Tony Guise advised that he would be prepared to Chair, so long as it was for item 10 only; this was Seconded by others at the meeting.

Motion that Tony Guise be elected as Chair for this meeting is carried.

6. Allocation of Funding to School Improvement Clusters (half year report) Report

Report deferred to the June meeting.

7. Spend on High Needs Block Provision, including arrangements for commissioned places for pupils with Special Educational Needs

Report deferred to the June meeting.

8. Maintained School Balances – Spring Monitor

There is no need to bring this report to the June meeting as Jane will be bringing a further report that supersedes it.

9. Local Authority Redundancy Policy

There is no need to bring this item back to the June meeting as it has already been discussed as part of item 10. To raise any questions as part of the review of these minutes.

10. Allocation of 2022/23 Central Service Schools block (CSSB) central spend

This report was discussed at CPHA this morning and Mungo and Jo were asked to raise some questions. There have been discussions as to why the 62,000 should come to the Partnership Board, and whether this should be distributed between clusters to make up for the decrease in cluster funding.

Discussion that if the 62,000 goes to the Partnership Board, all schools, cluster leads and Heads can bid and that there is accountability for the way funds have been spent. The allocation from the Board was higher last year due to funding for the recovery plan. It was raised that the Partnership Board surplus is for all schools to use and is not Local Authority money. Lesley advised that there are still a number of sizable bids submitted directly to the Partnership Board,

there is challenge at the Board around criteria and suitability. Also some Heads feel it is more useful to have more money in one place, rather than broken down limiting what it can be used for.

The Partnership Board are aware that some schools are holding a surplus, as raised in the last meeting and would encourage all schools not to add to surpluses, but to spend the money on children in Calderdale.

Schools Forum Members asked that this item was deferred until the June meeting to allow time for CASH members to read and discuss this report.

Discussion on the 40,000 put aside for staff reallocation and redundancy, where did the figure come from? Will this be enough? Lesley expressed that there will be an extra 20,000 carried forward, meaning there will be 60,000 in the pot to support smaller schools with falling rolls that will not be accessing the falling rolls fund.

Regarding the £2,250 per cluster to backfill for cluster lead headteachers to prepare for and attend the 5 CPSIB meetings per year; concerns that this will set a precedent. A lot of Heads spend time preparing and attending meetings.

Schools Effectiveness Service: Schools Forum Members asked for a report to come to the June meeting on future plans for the service, taking into account that there will be no funding from next year and the implications from the White Paper. Suggest that a working party be set up to look at what is needed/wanted by schools to meet the needs of schools and maintain the high quality of services, funded in a sustainable way. The proposal is for us to have a bank of associates with a proven track record in school improvement and with the relevant expertise, to be employed in a more flexible model. The Inclusion Strategy Group will hold people to account regarding spend, and will report to the Partnership Board, who in turn are held to account by the Health and Wellbeing Board as part of the Health and Wellbeing Strategy.

There is recognition that schools want more central services, however, there are concerns that schools will end up 'paying twice'.

Proposals:

- Option 1: support the recommended allocation of the 2022/23 Central School Services Budget as set out in the report;
- Option 2: Distribute the £62,000 one-off increase to the CPSIB across the clusters in accordance with the proposal from CPHA;
- Option 3: £62,000 one-off increase to the CPSIB budget for schools and clusters to bid for.

Option 3 accepted in principle, ringfenced - to take to CASH for discussion on final allocation.

Breakdown by cluster: Lesley and Paul to work on different models of distribution and bring back to the June meeting.

11. Schools White Paper: opportunity for all and SEND and AP Green Paper

Report deferred to the June meeting for discussion. However, as the consultation period ends in June 2022, a copy of the Green Paper will be distributed with these minutes to allow for Schools Forum Members to feedback.

12. Self-Assessment Feedback

Deferred to the June meeting.

13. Work Programme

Deferred to the June Meeting.

14. Any other business

Jane advised that she will be bringing a paper on the national funding formula to the meeting in June, due to take affect in 2023.

Discussion that the CASH Conference may take place on 23 June 2022; Tony to ring Helen once confirmed to arrange an alternative date. To extend the June meeting by 1 hour to ensure we have enough time to hear all reports.

15. Future dates

23 June 2022
24 November 2022
12 January 2023
27 April 2023
22 June 2023

All meetings will start at 4pm
Venue: Virtual

Report to Schools Forum

Meeting Date	Thursday 28 April 2022, deferred to meeting on 30 June 2022
Subject	Impact of Allocation of Funding to School Improvement Clusters (half yearly report)
Report Author	Connie Beirne Interim Service Manager for Early Years and Schools Strategy and Performance

Report purpose

- To provide members of the Schools Forum with a summary of the impact of funding allocated to each Cluster via the agreed formula. The impact of funding to schools allocated through agreed bids up to and including March 2022 will be reported in November 2022, following evaluation at that point. It has been difficult for some of the bids awarded to be able to meet original agreed deadlines, due to the effect of COVID-19 on schools. This report contains a summary of the accounts provided by clusters (form A4). Full information is on the A4 forms which are available on request – see point 3b.
- To provide a summary of the impact of funding across Calderdale schools as a whole over the past financial year.

Need for consideration

The effectiveness of use of Dedicated Schools Grant funding in securing school improvement.

Need for decision

- This report is for information about the impact of school improvement funds.
- Information is provided to support decision making by Schools Forum about future funding for the self-improving school cluster model in Calderdale.

Contact Officers

Lesley Bowyer – Assistant Director: Education and Inclusion lesley.bowyer@calderdale.gov.uk

Connie Beirne - Interim Service Manager for Early Years and School Strategy and Performance connie.beirne@calderdale.gov.uk

Report to Schools Forum

1. Background information and context

1. The Calderdale Partnership School Improvement Board (CPSIB), working with Local Authority officers, reports twice a year to the Schools Forum on allocations made during the year from this fund and on the impact of those allocations.
2. A full breakdown of funding allocations is provided in **Appendix 1**.

Funding for the financial year 2021-22 was:

Ongoing DSG Funding	£364,000
Additional One-off Funding from DSG Savings	£340,000
Brought Forward	£102,143
Budget	£806,143

Funding for the financial year 2022-23 is:

Ongoing DSG Funding	£364,000
Proposed Additional One-off Funding from DSG Savings (subject to Schools Forum approval)	£96,000
Brought Forward	£106,364
Budget	£566,364

3. As these funds are top sliced from the historic element of Calderdale's Dedicated Schools Grant (DSG), they can be accessed by both maintained schools and academies, through funding allocated to clusters and following appropriately approved bids through the Calderdale Partnership School Improvement Board (CPSIB). However, DSG funding is restricted to Pre-16 pupils, in which case these funds are not available for Post 16 provision.

2. Main issues for Schools Forum

- 1) £102,143 was brought forward from the financial year 2020-21, which with the budget allocation of £364,000 and the additional one-off funding of £340,000 from DSG savings that was approved by the Schools Forum, gave a total budget for 2021-22 of £806,143. The total spend in 2021-22 was £699,779, leaving a carry forward of £106,364.
- 2) Whilst the historic element of the DSG is reducing once again by 20% in 2022-23, there remains sufficient funding to allocate the annual budget of £364,000 to the CPSIB. There is a further element of £96,000 available in the historic

element which can provide additional one-off funding, subject to approval by the Schools Forum. The total proposed budget for 2022-23 will therefore be £566,364 which will allow for effective resourcing of agreed school improvement activity to support COVID recovery. The additional one-off funding will be used to fund the back fill for cluster lead heads (£2,250 each) agreed at the last CPSIB meeting along with a £2,000 additional payment to each cluster leaving an amount of £62,000 to add to funds available for bids (**Appendix 1**).

- 3) The CPSIB considers each bid against the criteria in the Partnership Framework, with a particular focus on supporting proactive bids that benefit a number of schools and which are supported by evidence-based research. An increasing number of bids presented focus upon addressing staff and pupil health and wellbeing needs due to COVID-19 as well as opening out further enrichment opportunities that became inaccessible to children during the pandemic.
- 4) A summary of the impact of allocations for funds allocated can be found in **Appendix 2**. Please contact Connie Beirne - Connie.beirne@calderdale.gov.uk for full details. Impact reports will be presented for bids funded between March 2021 and October 2021 at the Board meeting in July 2022 and bids approved at the March 2021 meeting will be evaluated and reported in November 2022.
- 5) A summary of the itemised Cluster Finance Reports is included in Appendix 2 for information.
 - a. As reported in November 2021, eight maintained primary schools were eligible for the DFE School Improvement/Trust Support offer in 2020-21. All eligible schools were able to access 3 days of NLE support, and going forward, as other schools receive Ofsted judgements of Requires Improvement, we continue to work with the DFE and schools to access this free offer of support.
 - b. A programme of improvement work, through clusters and the Calderdale Primary Development Programme has continued to address key priorities during the pandemic. The School Effectiveness Service (SES) has worked with Cluster Officers to ensure that work can be adapted and continue during the period of restrictions. Work has also taken place to support schools in curriculum development to address the increased gaps expected to be seen for key groups and to plan for the missed sequences of learning. These programmes have been highly successful and impact is evident in schools.
 - c. All schools will have contact from their allocated School Effectiveness Officer in the summer term and appropriate ways of working will be agreed with Band C and D schools to continue the Local Authority's statutory duty of support, challenge and brokering of support.

3. Impact of funding, targets and milestones

1. Almost all schools engage well with the self-improving school cluster model and benefit from joint working and improvement work specific to the needs of the cluster. Consequently, funding from the DSG is having a measurable impact on outcomes for children and young people across the borough.

2. Use of DSG funding enables clusters to be professionally led by a Cluster Officer (remunerated through cluster funding) and a Cluster Lead Headteacher (to be funded to attend CPSIB from April 2022). As a result, the improvement plans are sharply focused in clusters to ensure that local priorities are addressed, linked to the LA priorities and development plans.
- c) Cluster funding is used to provide support and challenge to schools where concerns are identified enabling early intervention and an additional level of support prior to any bids being submitted to the CPSIB.
- d) Whilst there has been little published data since the start of the pandemic, the impact of work undertaken by individual schools, clusters and the School Effectiveness Service (SES) was evident in the 2019 outcomes which improved at almost all headline measures in early years and primary phase, with attainment at the end of Key Stage 2 improving to be in-line with national for all pupils. Primary phase progress measures in Reading and Mathematics were above national and progress in Writing, whilst below national, improved from -1.6 in 2017 to -0.8 in 2019. Outcomes in secondary phase remained consistently strong. Nonetheless, key priorities continued to include closing the gap for disadvantaged children and those with SEND, raising attainment to be at least in line with national at all key stages and ensuring progress at the end of key stage 2 in Writing is at least in line with national.
- e) The national data has not yet been published for the Phonics Screening Check carried out with Year 2 pupils in autumn 2021. However, the emerging data shows that Calderdale pupils achieved above the national average for all key groups and overall showed an increase compared to a drop in the emerging national data.
- f) Outcomes published for Key Stage 4, whilst not comparable to previous years, is a similar very positive picture, showing that Calderdale students outperformed all students nationally at all key measures, other than for the % of students achieving Ebacc at grades 9-5.
- g) The Education Recovery Plan 2021-26 includes 4 strands of work: Education Recovery, Wellbeing, Workforce Development and Digital Inclusion. Much of the work taking place across clusters, links to one or more of these strands of work.
- h) School Effectiveness Officers would usually conduct a detailed analysis of unvalidated data however, changes to assessment along with statutory guidance that data will not be used for accountability purposes in both 2020 and 2021 means there is no analysis to support evaluations as to the impact of improvement work. However, statutory assessments will take place in summer 2022, so a detailed analysis of unvalidated data will take place later this year.
- i) School improvement work has continued along with a priority for schools, clusters and the School Effectiveness Service to support during the pandemic, including during periods of restricted attendance and high local rates of transmission to enable schools to operate safely and effectively.

- j) There have been challenges in measuring the impact of work during the pandemic, however, in this academic year 2021/22, statutory assessments from early years through to the end of key stage 2 and of exams at the end of key stages 4 and 5 will take place. Therefore, the Local Authority risk assessment process regarding school effectiveness will continue to be undertaken using unvalidated data, all available information and the school's own self-assessment.
- k) Ofsted returned to full inspections from September 2021. 82% of Calderdale primary schools were judged to be Good or better at the end of February 2022 compared to 88% nationally, Calderdale ranking 134/152 LAs (down from 130/152 in March 2021). In the secondary phase 77% of schools were judged Good or better in Calderdale compared to 78% nationally, rank 87/152 LAs. The special schools and alternative provision are all at least Good and Calderdale ranks 1 for those groups of schools. Improving the Ofsted rating of schools in Calderdale remains a priority.

4. Resource implications

- 1 The funding for the self-improving school cluster model is having an impact on improving outcomes for children and in the ability to respond to changing needs during the pandemic. It is currently funded through DSG which is reducing over time.

5. Recommendations

- 1. The Schools Forum accepts this report on the allocation of funding to school improvement clusters.

6. Reasons for recommendations

- a)** Schools have faced unprecedented challenges during the COVID pandemic and the work of clusters and the School Effectiveness Service has been vital in supporting schools to respond to ever changing guidance and situations whilst continuing to focus on the quality of education through remote and face-to-face learning and the safeguarding, health and wellbeing of pupils and staff.
- b)** Whilst the impact of funding allocation is evident through the excellent response of schools during this period and the improvements already secured, further work is required to ensure children in Calderdale achieve at least as well as their peers nationally at all key points and are educated in schools that are at least Good.
- c)** The data available for Year 2 Phonics and end of key stage 4 shows that all groups of students have achieved better than the same groups nationally. There remain inequalities for disadvantaged children and those with SEND which are expected to have widened during a two-year period of disrupted education. School improvement funding is required to support clusters and schools in closing those gaps.

7. Appendices

Appendix 1

Calderdale Partnership School Improvement Board

Funding for Financial Year 2021-22		£
On-going Budget		£364,000
Additional one-off funding from DSG savings		£340,000
Balance Brought Forward		£102,143
Budget		£806,143

Cluster Funding - Allocation 2021-22		
Calder Valley (Midgley)		£31,920
East Calderdale (Woodhouse Primary School)		£53,119
Elland (Cross Lane)		£39,399
North Halifax (Christ Church Pellon)		£63,137
Secondary (Halifax Academy)		£131,669
Sowerby Bridge (St Mary's J&I Sowerby)		£40,521
Todmorden (Castle Hill J&I)		£32,924
Special Provision (William Henry Smith)		£28,539
Total		£421,228

Bids Agreed July 2021		
Elland Cluster		£22,675
Lee Mount		£11,500
Todmorden Cluster		£36,251
Trinity Academy Grammar		£5,280
SPC Training		£24,000
SBM Network		£2,000
Park Lane Academy		£8,000
Total		£109,706

Bids Agreed October 2021		
School Effectiveness Heartstone		£29,000

School Effectiveness Curriculum		£6,000
CVC – Hebden Royd		£4,500
Total		£39,500

Bids Agreed December 2021		
School Effectiveness Curriculum		£6,000
Carr Green and Salterhebble		£14,800
Sowerby Bridge		£12,500
Total		£33,300

Bids Agreed March 2022		
The Calder Learning Trust		£4,450
School Effectiveness – New Heads support programme		£30,000
EEF/CPHA: Literacy		£18,125
Todmorden Cluster		£10,000
Total		£62,575

Total all funding		£806,143
Total Allocations		£699,779
Balance Carried Forward		£106,364

Funding for Financial Year 2022-23	£
On-going Budget	£364,000
Additional one-off funding from DSG savings	£96,000
Balance Brought Forward	£106,364
Budget	£566,364

Cluster Funding - Allocation 2022-23		Additional Fund allocation (Heads backfill £2,250 and additional £2K per cluster)
Calder Valley (Midgley)	£23,512	£4,250

East Calderdale (Woodhouse Primary School)	£32,890	£4,250
Elland (Cross Lane)	£26,956	£4,250
North Halifax (Christ Church Pellon)	£37,135	£4,250
Secondary (The North Halifax Grammar)	£67,345	£4,250
Sowerby Bridge (St Mary's J&I Sowerby)	£26,671	£4,250
Todmorden (Walsden St Peter's)	£24,136	£4,250
Special Provision (William Henry Smith)	£20,320	£4,250
Total	£258,965	£34,000

Total all funding	£566,364	
Cluster Formula allocations – as above	£292,965	
Balance available	£273,399	

Appendix 2 – Impact of Allocation of Funding (these will be re-evaluated in light of no statutory assessments) – Impact reports to CPSIB July 2022

Bids Agreed March 2021 – Oct 2022	
East Calderdale Cluster	£22,200
Sowerby Bridge Cluster	£8,970
Elland Cluster	£22,675
Trinity Academy Grammar	£5,280
SPC Training	£24,000
SBM Network	£2,000
Park Lane Academy	£8,000
Calder Valley Cluster – Hebden Royd	£4,500

Calder Valley Cluster	
Focus	Impact
<p>Priority 1: Leadership To continue to develop leadership at all levels across the cluster</p>	<p><u>March 2021 to July 2021</u> This builds on the progress reported Sept-February 2021 (see below)</p> <ul style="list-style-type: none"> Senior leaders feel that they have been well supported working collaboratively with cluster colleagues during the global pandemic (COVID-19). <i>'The support this year has been vital. The support by the Cluster What's App, by emails and at cluster meetings by Zoom has been really important to me. It has kept us going in difficult times knowing that you are not the only one and that there is always some to answer any problems or when you need a lift! We also share good news and a laugh on it which has been equally important!'</i> <i>'Signposting and information sharing about experiences of NTP programme, COVID-19 guidance and falling roll funds also very useful'</i> SEND, EY and maths leaders further developed their skills leading networks across the cluster working collaboratively. The early years and SEND networks were very well attended and enabled leaders to share their work, including blended learning and supporting vulnerable pupils. The cluster officer delivered a training session with a focus on the Education Inspection Handbook for EY and SEND leaders. The maths network only met once and there is currently no English network due to no one wishing to take on the role as the network leader. The governor representative has continued to keep other governors up to date with the working of the cluster, providing a termly summary of the key actions. Leaders have kept up to date with national and Ofsted updates, the cluster officer has provided regular feedback. Comments from the end year headteacher evaluations of the cluster working: <i>'During my first year of headship the CVC was critical to my knowledge and understanding of the wider priorities of schools. It has given me opportunities to access information and support in a timely and appropriate manner.'</i> <i>'Maths, EYFS and SENCo leaders have attended networks which has enabled us to keep abreast of updates and new initiatives. The networking especially during Covid has been vital for staff morale and wellbeing'</i> <i>'Useful signposting which I have used such as signposting to Noah's Ark for pupil counselling'</i> <i>'Our SEND, Early Years and Maths lead have benefitted from attending the cluster meetings – giving them an increased understanding of current priorities, sharing good practice and support and advice'.</i>

	<p><i>'Leading the group has really built our EYS teacher's self-confidence'</i></p> <p><u>End of year</u></p> <ul style="list-style-type: none"> - Senior leaders feel that they have been well supported working collaboratively with cluster colleagues during the global pandemic (COVID-19). - Middle leaders further develop their skills leading networks across the cluster working collaboratively. - Senior leaders provide effective mentoring and coaching to middle leaders. - Subject leadership within schools continues to develop and pupils access a high quality of education.
<p>Priority 2: Health and Wellbeing: To continue to support the health and wellbeing of staff and pupils</p>	<p><u>March 2021 to July 2021</u></p> <p>This builds on the progress reported Sept-February 2021 (see below)</p> <ul style="list-style-type: none"> • A headteacher has provided information about the benefits of the Calderdale Mental Health Support Teams. Four more CVC schools have been successful to start next year • Audit of Forest School provision across the cluster and staff expertise. Plans to work collaboratively next year. • Review of CVC EHNA. Some positive outcomes from the annual eHNA survey e.g. <ul style="list-style-type: none"> - High number of pupils (80% upwards) had been taught or felt well informed about topics such as healthy relationships, keeping safe online, diet, nutrition and exercise and emotional well-being - 83% of pupils feel safe using the internet all the time/quite often. Only 1% never felt safe. - 76% of pupils feel as though they are 'thriving' in life • Comments from the end year headteacher evaluations of the cluster working: <p><i>'CVC has had a positive impact on my well-being due to the advice, support and shared ideas from MJ and other heads'.</i></p> <p><i>'Staff absence in school has been low. Pupil absence is low. 80% of pupils described their health as excellent or good in the EHNA survey'.</i></p> <p><i>'Additional funding for this has allowed us to purchase more art materials and more playground equipment to encourage healthy lifestyles'</i></p> <p><i>'Having the funding to do the scoping exercise across the cluster, gave everyone a chance to share alternative approaches'</i></p> <p><i>'Funding has allowed us to have Luke Ambler in for a well-being programme with Year 5/6 pupils'</i></p> <p><i>'Wellbeing journals have also been purchased for all KS2 pupils'</i></p> <p><i>'Networking has helped staff especially during Covid'</i></p> <p><i>'Funding has helped to develop our Forest School so that each class uses on a weekly basis'</i></p>

	<p><i>‘Again, the opportunities the CVC has provided in supporting or guiding to appropriate levels of information has been crucial during 20/21 (mid pandemic). Luke Ambler sessions for children, discussion regarding EHNA and School nursing team and information sharing regarding in-house issues has been critical to accessing fast and appropriate levels information’</i></p> <p><u>End of year</u></p> <ul style="list-style-type: none"> - Internal anecdotal evidence demonstrates that staff and pupils have been well supported. - Positive outcomes from the annual eHNA survey (Electronic health needs assessment).
<p>Priority 3: Learning: To continue to support pupils to achieve well; identifying and teaching gaps in learning and teaching the curriculum through blended learning including remote</p>	<p><u>March 2021 to July 2021</u> This builds on the progress reported Sept-February 2021 (see below)</p> <ul style="list-style-type: none"> • There were no statutory tests in 2020-2021 to compare to national • Schools report they delivered a full curriculum by summer 2021. • The EY and SEND network have met to share practice, including blended learning • 39 teaching assistants in CVC attended a 6 weeks course to further develop their maths subject knowledge, this was delivered by the WY Maths Hub-the feedback was positive (see below) • Maths leaders worked together looking at catch up plans, gaps, platforms used, interventions and the EYFS • EY leaders looked at New EY Foundations Stage Framework, Development Matters, Baseline, Early Excellence Course feedback-preparing for change • SEND leaders met the head of Calderdale SEND team to talk about LA provision. • Comments from the end year headteacher evaluations of the cluster working: <p><i>‘Very positive feedback from Tas on the Maths course run by the Maths Hub. Tas reported a more secure understanding of Maths concepts, how best to support the teaching of these and how the Maths curriculum is structured over the year groups.’</i></p> <p><i>‘The funding to carry out the scoping of remote learning across the cluster allowed everyone to share ideas for how best to provide a good quality of provision.’</i></p> <p><i>‘7 of our TAs completed the White Rose Maths TA course. Teachers have commented on staff modelling better mathematical vocabulary and being able to support in lessons more effectively as a result of the course’</i></p> <p><i>‘Sharing good practice has helped us as we have heard about the ‘Mastering Number’ project, the NELI project, The English Hub Audit and registered/completed these. All were heard about in</i></p>

	<p><i>Cluster meetings or other Heads talking about their experience or MJ recommending'</i></p> <p><i>'The CVC have shared opportunities to support home learning (IT sources) and shared best practice regarding home learning packages.'</i></p> <p><u>End of year</u></p> <p>Outcomes to be at least broadly in line with national. (SINCE PLANNED TESTING HAS BEEN CANCELLED) Schools resume full curriculum no later than summer 2021 (DFE guidance, September 2020).</p>
<p>Priority 4: Vulnerable pupils: To support vulnerable pupils to access the curriculum and achieve well</p>	<p><u>March 2021 to July 2021</u></p> <p>This builds on the progress reported Sept-February 2021 (see below)</p> <ul style="list-style-type: none"> • SEND network have met to share practice • The SEND cluster network leader has shared training about the Engagement Model • The SEND network has met Ben Allchin, LA Service Manager for Inclusion and SEND, to look at LA SEND provision • SEND leaders had training to support them to quality assure their provision and how to apply Education Inspection Framework when looking at the provision for pupils with SEND (delivered by the cluster officer) • The SEND network leader is proactive and keeping colleagues up to date, attending training and cascading. • Comments from the end year headteacher evaluations of the cluster working: <p><i>'Having Ben Allchin as guest speaker at the meeting, very useful'. 'SEN network has been useful to hear from new SEN Team and receive updates'</i></p> <p><i>'I have linked with a member of the CVC to provide 'supervision' for safeguarding matters. Local knowledge can be crucial to making quick, effective and meaningful decisions'</i></p> <p>End of year</p> <p>Ofsted inspections recognise good quality provision for vulnerable pupils. School leaders demonstrate and share with colleagues the positive impact of their work on pupils' achievement.</p>

With the appointment of Jackie Nellis to Cluster Officer in March 2021, the schools concerned agreed to work on a cluster plan for 2021/22 – which would encompass, some of the work started and halted in their original plan 2020/21, whilst a cluster officer was appointed. Below is outlined these priorities and some updates so far.

Focus	Impact
<p>Cluster Priorities PRIORITY 1: LINGO PROJECT– EARLY LANGUAGE ACQUISITION Concerns regarding early language acquisition (particularly vulnerable children) and the ability of children in the Todmorden cluster to access the curriculum and the development of their communication and literacy skills.</p>	<p>The LINGO project will be commissioned to support children attending Todmorden cluster schools to enhance early language acquisition and speech therapy.</p> <p>See Appendix 3 for the Todmorden Cluster SaLT Project report</p>
<p>PRIORITY 2: Inclusion – behaviour and wellbeing. Ensuring all our pupils in the Todmorden Cluster are supported and their needs are met, drawing on more specialist support where necessary, leading to a positive experience of learning and outcomes.</p>	<p>The impact on pupils’ wellbeing and behaviour due to the disruption to education during the pandemic Additional support for Cluster Schools from Family Support Worker/Social worker appointed to work with Todmorden Cluster Schools (bid to Partnership Board February 2022)</p>
<p>PRIORITY 3: Sustain effective leadership and management at all levels across cluster schools throughout the pandemic</p>	<p>Ensuring schools are prepared for Ofsted inspection, focusing specifically on the quality of education</p>

Elland Cluster	
Focus	Impact
<p>Cluster Priorities</p> <p>1. Recovery Curriculum;</p> <ul style="list-style-type: none"> to support the wellbeing of pupils, to help pupils to settle back into school to provide a wide range of opportunities for pupils to re-engage with their learning, so that lost time can be recaptured and rapid progress can be made writing <p>2. to develop the 'Intent', 'Implementation' and 'Impact' elements of the 'New Curriculum</p>	<p>Impact Measures in the Development Plan;</p> <ul style="list-style-type: none"> 100% schools inspected by Ofsted in 2020 - 2021 are at least, Good or appropriate action is being taken <p>No schools were inspected during 2020 - 2021</p> <ul style="list-style-type: none"> By July 2021, no school considered by the LA to be highly vulnerable <p>September 2021 LA Risk assessments indicate that no school is highly vulnerable</p> <ul style="list-style-type: none"> 100% schools meet their own SDP outcomes for progress at the end of Key Stage 2 in Writing for all pupils, Disadvantaged pupils, SEND pupils <p>Not met,</p> <ul style="list-style-type: none"> 100% schools meet their own SDP outcomes for attainment in Writing for all year groups for all pupils, Disadvantaged pupils, SEND pupils <p>Not met</p> <p>The Cluster Development Plan was agreed at the September Cluster meeting, when the Covid 19 situation was still precarious and the future provision of face-to-face education remained uncertain. All pupils returned to school in September with significant restrictions on pupil and staff movement. There was still the requirement for testing, isolation and bubble/class closure. Schools were open for the full term. In January, schools reopened for the Spring term, but closed after the first day and remained closed until towards the end of term.</p>

North Halifax Cluster	
Focus	Impact
<p>Cluster Priorities</p> <p>1. Supporting smooth transition (As schools return to full opening) to ensure the wellbeing of pupils, staff and parents so that learners make good progress</p>	<p>Every school remained open for the vast majority of students (minimal bubble/school closures) and almost all pupils reconnected with learning up to the point of the second lockdown but learning gaps are exceptionally wide for this large, cluster group of disadvantaged learners.</p> <p>Lesson outcomes for all students underpinned by effective recovery planning through access (for a large number of families) to a full range of pastoral and academic support</p> <p>Stage 1 of data collection complete and interim report available for scrutiny. This is to be discussed at the cluster meeting 16.03 21 and next steps of research identified. Level of disadvantage confirmed to be extreme (using deprivation indicators)</p> <p>SEN provision continued to improve in almost all schools as a result of engagement with SPC offer and sharing of practice/pedagogy (SEND, EY and science provision with greatest impact (from exceptionally low AOE) through the networks.</p> <p>All available evidence/reports forwarded. Key, targeted schools signposted to relevant reports and national/regional reports/actions</p> <p>Subject leaders' aware of curriculum evidence research such as:</p> <ul style="list-style-type: none"> • <i>Leadership Matters 3.0</i> (Andy Buck) • <i>The Curriculum: Gallimaufry to Coherence</i> (Mary Myatt) <p>Sequential planning complete in almost all schools. Content is on each school website. Pupils have been involved in this.</p> <p>Leaders confirmed that all additional support in place to support ECTs. All NQTs accessed LA support network</p>
<p>2. Sustain effective leadership and management at all levels across cluster schools</p>	<p>Leaders have developed and shared a suite of resilience strategies to protect their own well-being and that of staff. A governors' workshop was delivered (12/19 schools) to ensure that governors were aware of the issues risking HT well-being and sharing of strategies to mitigate. Further work is being commissioned from Rezina Kelly</p> <p>Support for monitoring of catch-up funding commissioned to support HT workload.</p> <p>All schools had remote learning policy in place by the end of October, shared on the school website. These are referenced in Business Continuity Plans, updated in the short-term as an appendices full review of each school's BCP</p> <p>All schools had plans in place to return to full curriculum implementation by the summer target date, thwarted by the second national lockdown</p> <p>New heads were funded by the cluster to attend the new HT network (LA)</p> <p>3 schools (3 days) accessed cluster support to date</p> <p>All SEND leaders confirmed good quality and that content has improved school provision and assessment in cluster schools. Progress now evidenced in smaller steps, crucial for the large majority of vulnerable learners in the cluster</p>

	<p><i>Work on both key priorities was established in the full knowledge of the impact of the ongoing pandemic in children's learning (PDP2) and the likelihood of further disruption to pupils' learning through a further national lockdown. Each priority therefore focused on specific issues arising from ongoing sharing of practice, concerns and solutions – with a precise focus on the well-being of head teachers (to sustain effective leadership and management in all cluster schools – PDP1) and a further particular emphasis on curriculum development (PDP3) and the short/medium term adaptations necessary to enable pupils to recover, over time, substantial gaps in their learning (PDP2). Nonetheless, work on researching the impact of lockdowns/remote learning on families living in prolonged and extreme disadvantage (PDP2) and the second part of our SEND leadership programme (PDP1 and PDP3) has all continued against the background of an autumn period of recovery of learning routines/curriculum reconnection (PDP2 and PDP3) and a spring period of second lockdown</i></p>
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Sowerby Bridge Cluster	
Focus	Impact
<p>Cluster Priorities</p> <p>1. Supporting smooth transition (As schools return to full opening) to ensure the wellbeing of pupils, staff and parents so that learners make good progress</p>	<p>Every school remained open for the vast majority of students (minimal bubble/school closures) and almost all pupils reconnected with learning up to the point of the second lockdown</p> <p>Lesson outcomes for all students underpinned by effective recovery planning through access to a full range of pastoral and academic support</p> <p>SEN provision continued to improve in almost all schools as a result of engagement with SPC offer and sharing of practice/pedagogy with greatest impact through the SB networks. Some schools accessed Education Psychology support (cluster commissioned but funded from ISBs). Bid for <i>Rainbows</i> training submitted to PB to become <i>trauma and counselling</i> excellence hub</p> <p>All available evidence/reports forwarded</p> <p>Subject leaders' aware of curriculum evidence research such as:</p> <ul style="list-style-type: none"> • <i>Leadership Matters 3.0</i> (Andy Buck) • <i>The Curriculum: Gallimaufry to Coherence</i> (Mary Myatt) <p>Sequential planning complete in almost all schools. Content is on each school website. Pupils have been involved in this.</p> <p>Leaders confirmed that all additional support in place to support ECTs. All NQTs accessed LA support network</p>

<p>2. Sustain effective leadership and management at all levels across cluster schools</p>	<p>Leaders have developed and shared a suite of resilience strategies to protect their own well-being and that of staff. A governors' workshop was delivered (13/18 schools) to ensure that governors were aware of the issues risking HT well-being and sharing of strategies to mitigate</p> <p>All schools had remote learning policy in place by the end of October, shared on the school website. These are referenced in Business Continuity Plans, updated in the short-term as an appendices full review of each school's BCP</p> <p>All schools had plans in place to return to full curriculum implementation by the summer target date, thwarted by the second national lockdown</p> <p>All completed</p> <p>New heads were funded by the cluster to attend the new HT network (LA)</p> <p>4 schools (5 days) accessed cluster support to date</p> <p>Leadership conference could not go ahead due to physical distancing restrictions still in place</p> <p><i>Work on both key priorities was established in the full knowledge of the impact of the ongoing pandemic in children's learning (PDP2) and the likelihood of further disruption to pupils' learning through a further national lockdown. Each priority therefore focused on specific issues arising from ongoing sharing of practice, concerns and solutions – with a precise focus on the well-being of head teachers (to sustain effective leadership and management in all cluster schools – PDP1) and a further particular emphasis on curriculum development (PDP3) and the short/medium term adaptations necessary to enable pupils to recover, over time, substantial gaps in their learning (PDP2). Our cluster bid to become an excellence hub for trauma and counselling will further support this work and enhance planned outcomes identified in the cluster plan for the summer term</i></p>
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East Calderdale Learning Cluster	
Focus	Impact
<p><u>Cluster Priorities</u></p> <p>1. Supporting smooth transition (As schools return to full opening) to ensure the wellbeing of pupils, staff and parents so that learners make good progress</p>	<p>Every school remained open for the vast majority of students (minimal bubble/school closures) and almost all pupils reconnected with learning up to the point of the second lockdown</p> <p>Schools are aware of LA criteria and now await further information</p> <p>Lesson outcomes for all students underpinned by effective recovery planning through access to a full range of pastoral and academic support</p> <p>SEN provision continued to improve in almost all schools as a result of engagement with SPC offer and sharing of practice/pedagogy with greatest impact through the ECLC network. Bid for <i>Forest School</i> training submitted to PB to become <i>Forest Schools'</i> excellence hub to narrow learning gaps</p> <p>Subject leaders' aware of curriculum evidence research such as:</p> <ul style="list-style-type: none"> • <i>Leadership Matters 3.0</i> (Andy Buck) • <i>The Curriculum: Gallimaufry to Coherence</i> (Mary Myatt) <p>Sequential planning complete in almost all schools. Content is on each school website. Pupils have been involved in this.</p> <p>Leaders confirmed that all additional support in place to support ECTs. All NQTs accessed LA support network</p>
<p>2. Sustain effective leadership and management at all levels across cluster schools</p>	<p>Leaders have developed and shared a suite of resilience strategies to protect their own well-being and that of staff. A governors' workshop was delivered (13/18 schools) to ensure that governors were aware of the issues risking HT well-being and sharing of strategies to mitigate</p> <p>All schools had remote learning policy in place by the end of October, shared on the school website. These are referenced in Business Continuity Plans, updated in the short-term as an appendices full review of each school's BCP</p> <p>All schools had plans in place to return to full curriculum implementation by the summer target date, thwarted by the second national lockdown</p> <p>3 schools accessed cluster support to date</p> <p>There is a budget reserve to support this work when key schools are jointly identified by the LA in partnership with ECLC – awaiting LA report</p> <p><i>Work on both key priorities was established in the full knowledge of the impact of the ongoing pandemic in children's learning (PDP2) and the likelihood of further disruption to pupils' learning through a further national lockdown. Each priority therefore focused on specific issues arising from ongoing sharing of practice, concerns and solutions – with a precise focus on the</i></p>

	<p><i>well-being of head teachers (to sustain effective leadership and management in all cluster schools – PDP1) and a further particular emphasis on curriculum development (PDP3) and the short/medium term adaptations necessary to enable pupils to recover, over time, substantial gaps in their learning (PDP2). Our cluster bid to become an excellence hub for Forest Schools (to narrow learning gaps for the most vulnerable pupils) will further support this work and enhance planned outcomes identified in the cluster plan for the summer term</i></p>
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SPC Cluster	
Focus	Impact
<p>Cluster Priorities</p> <p>1. Supporting smooth transition to ensure that priorities from the last academic year are successfully accomplished to ensure the well-being of pupils, their families and staff, so that students on all learning pathways continue to make good progress</p>	<p>Every school remained open for the vast majority of students (minimal bubble/school closures) despite the proportions of staff required to shield and the needs and vulnerabilities of our students and despite significant staff anxiety when vaccinations were not (unlike other LAs) authorised for staff in special schools <u>until February 2021</u></p> <p>Schools maintained adequate stocks of PPE due to successful bid to the Partnership Board. Transport systems adapted to support attendance</p> <p>Feedback from DSLs attending SPC safeguarding network evidence that 100% feel it has supported their work in SPC schools</p> <p>Lesson outcomes for all students underpinned by effective recovery planning through access to a full range of personalised pathways, supported by evidence-based research of impact of therapies used to determine possible training</p> <p>Specialist TRG established within the West Yorkshire Maths Hub ensuring mastery is embedded throughout SPC maths curriculum</p> <p>Reading leaders' audit established (wider than phonics) to enable bespoke specialist 'deep dives' in summer term ITT model developed to the point of planning delivery/professional studies content for implementation of a 'hybrid' apprenticeship model from July 2021 – <u>3 apprentice trainees ready to access</u>, reflecting effective early talent management and succession planning</p>
<p>2. Continue to provide high quality outreach work to support SEND leaders in mainstream schools through</p>	<p><i>Effect of Stress on Learning</i> CPD programme attended by leaders/teachers from 56 primary schools, 2 secondary schools and 2 special schools. Input and pedagogical practice then discussed in mainstream clusters/SEND networks. Consequently, the majority of SEND learners have benefitted, and continue to benefit from, universal training on implementing a recovery curriculum and the stress if lockdown on learning.</p>

<p>training programmes for staff and direct work with pupils, in order to improve SEND provision and leadership across the Local Authority</p>	<p>Support surgeries extended to monthly rather than half termly, increasing capacity three-fold. All places for Nov/Jan/Feb/March fully booked. 100% feedback from client schools say advice was strong. Randomised subsequent sampling shows almost all learners referred to surgeries made progress in the specific area of referral and none were at risk of exclusion</p> <p>Exact nature of issues/advice at surgeries analysed to inform development of spring and summer term offers, thus avoiding future critical concerns:</p> <ul style="list-style-type: none"> • <i>Building Resilience</i> • <i>Importance of Teaching Effective Behaviour for Learning</i> • <i>Secondary SENDCo network development</i> • <i>Secondary TA training/interventions</i> <p>Face to face audits could not take place but schools furnished with simple audit tools, to be further developed by the LA ahead of a 're-launch' of the SEND network (Ben Allchin)</p> <p><i>Work on specialist ITT route (PDP1); mastery maths TRG (PDP3), reading leadership work (audits/deep dive tool for specialist settings – PDP1 and PDP3) and increased frequency of outreach work (PDP2) has all continued against the background of an autumn period of recovery of learning routines/curriculum reconnection (PDP2 and PDP3) and a spring period of second lockdown. A full audit of secondary SEND needs was undertaken with SENDCos and, as a result, a bespoke secondary programme is now ready to begin from 23 March 2021 (CASH-AP). Concurrent to everything, SPC schools have maintained a focus on keeping exceptionally vulnerable pupils (with highly complex needs) and anxious staff (working with high needs young people) safe and focused to ongoing recovery (PDP2 and CASH-AP)</i></p>
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Secondary Cluster	
Focus	Impact
	<p>See separate document</p>

Todmorden Cluster SaLT project

January 2022

Since the last update in November 2021, the focus has been on:

- Continued delivery of weekly **speech and language therapy support**
- Delivery of **interventions**; all schools have now received all intervention materials.
- **Training** – the priority last term was to run intervention training with the priority in the coming term to run broader training
- **Strategic support** – we have run two sessions for communication leads, one last term and one this.

Individual Speech and Language Therapy

Speech and language therapy support has continued on a weekly basis. To date 47 children have been referred into our service across the cluster. The majority have been seen for assessment and have management plans in place. Some children need further assessment to determine their more complex speech, language and communication needs.

Feedback from schools regarding the therapist's support have been very positive, both in terms of individual referrals and in support for interventions and more widely in general advice for teachers and support staff.

After each visit to school, the therapist sends a note of visit to summarise the focus of the visit, identify any actions between visits and confirm plans for the following session. Feedback on the notes of visit have been positive with schools valuing the information and clarity of provision.

Interventions

Interventions are underway in some schools, with others working through baselines or some putting interventions on hold for the time being.

Our suggestion is always to baseline the children before beginning the intervention. This ensures we are targeting the right children and provides a baseline to measure progress against. These assessments will need to be repeated after the intervention period in order to capture impact. We will provide a template for collecting the data this term, which allows us to capture individual pupil and school data, plus impact across the project.

Training

Intervention training for both **Chatterboxes** and **Language Legends** took place in November 2021. Training for the **Sounds Right** intervention is provided by the therapist, modelling strategies from the intervention and supporting identification of children who will benefit.

Following training, the therapist has offered support to baseline children where appropriate and model the intervention. Support is also offered for planning of Chatterboxes and Sounds Right in particular, both of which have flexibility built in to ensure they meet the needs of the children. Support for planning in early stages will ultimately build confidence and capacity for staff to run these interventions independently in the longer term.

Some schools were unable to attend the intervention training sessions. Our plan was to provide recorded versions so that they could access the training in a more flexible way. Unfortunately our planned recording sessions have had to be cancelled due to sickness before Christmas and in January due to Covid. We have therefore provided a recorded version of a live session to those schools who have requested this. The recorded version will be completed as soon as possible and shared with schools. We can also invite schools to any subsequent live sessions should this be useful.

Training programme: the wider training programme is planned for this and next term. Following discussion with Communication Leads, it was felt it would be useful to have this training recorded to help overcome some of the challenges in releasing staff, especially during the current situation with Covid.

The recorded sessions will be released regularly, and staff can follow up with any questions should this be useful. In addition, the therapist can support next steps for implementation of any strategies by modeling or talking through with staff in school. We are planning to go ahead with this unless it is felt live sessions would be preferable. We can review at the next strategic support meeting, or happy to receive any thoughts/feedback on delivery via e mail. The aim is to try and ensure all relevant staff can access training.

Strategic support

We have had two meetings with Communication Leads/SENCOs, one last term and one this. This is to:

- support planning and implementation of the project
- encourage leads to share how things are working in their schools
- troubleshoot any issues.

Feedback from leads in the meetings has been positive and it is a good opportunity to share practice and talk through any issues. Unfortunately, some of the schools have been unable to attend. We have tried to rearrange dates, though there is no simple overlap of staff attendance. Any follow up from meetings can be shared with SENCOs/Leads who cannot attend. I'm also more than happy to have a separate catch up if helpful.

Report to Schools Forum

Meeting Date	28 April 2022, deferred to the meeting on 30 June 2022
Subject	Spend on High Needs Block Provision, including arrangements for commissioned places for pupils with Special Educational Needs
Report Author	Paul Tinsley – Assistant Director Education and Inclusion Michael Benn – Senior Finance Officer

Report purpose
To inform Schools Forum members as to the Dedicated Schools Grant (DSG) High Needs Block allocation for 2022/23 along with an overview on how this funding is to be utilised.

Need for decision
Schools Forum is asked to note the content of the report, the High Needs funding for 2022/23 and its proposed use.

Contact Officers
Lesley Bowyer – Assistant Director Education and Inclusion Lesley.bowyer@calderdale.gov.uk
Michael Benn – Senior Finance Officer michael.benn@calderdale.gov.uk

Report to Schools Forum

1. Background information and context

- 1.1 Local authorities are required to advise their school forums on the proposed use of the High Needs Block (HNB) funding.
- 1.2 The operational guide sets out restrictions on how authorities can spend their allocations, and that authorities have flexibility to move money to and from their High Needs block into and from other DSG blocks if they wish.
- 1.3 The High Needs funding system supports provision for children and young people with special educational needs and disabilities (SEND) from their early years to age 25, enabling both local authorities and institutions to meet their statutory duties under the Children and Families Act 2014.

High needs funding is also intended to support good quality Alternative Provision (AP) for pre-16 pupils who, because of exclusion, illness or other reasons, cannot receive their education in mainstream or special schools.

The High Needs Funding Block provides local authorities with resources for place funding and top-up funding for institutions, and funding for high needs services delivered directly by the authority or under a separate funding agreement with institutions, as permitted by regulations.

- 1.4 The use of High Needs DSG funding is very specific. Attached in Appendix 1 is an extract from the Section 251 regarding the uses of the High Needs funding. Section 251 is part of the Apprenticeships, Skills, Children and Learning Act 2009.

2. Funding Allocation

- 2.1 In December 2021 the total 2022/23 High Needs funding allocation for Calderdale was announced as **£28,740,900**. The amount for 2020/21 was **£25,847,474**, giving an increase in 2022/23 of **£2,893,426**.
- 2.2 Following the spending review in Autumn 2021 an additional £325M was allocated nationally for High Needs in 2022-23 with the additional allocation to Calderdale being **£1,101,359**.
- 2.3 The total High Needs funding allocation for Calderdale is therefore **£29,842,259**.
- 2.4 The Council's overall allocation is top-sliced to fund pupils directly funded by the Education and Skills Funding Agency (ESFA) for post-16 pupils, pre-16 pupils in academies and deductions for place led funding in academies. This element of funding is then allocated direct to schools/academies/colleges via the EFSA as follows in Table 1 below:

Table 1: Funding allocated for top slice elements

Provision	2022/23 top slice
FE Places (16+) 130 places @ £6k (college) Academy PRU Places (80@ £10K) SEN units and pre-16 Academy pupils	£1,820,000
TOTAL	£1,820,000

- 2.5** The number of placements used to define funding is based on the annual place change notification return.
- 2.6** This leaves **£28,022,259** available to be spent by the Directorate compared to £24,047,474 in 2021/22, an increase of **£3,974,785**.
- 2.7** For the purposes of the report this is categorised into 4 specific areas
- a) Special Educational Needs (SEN)
 - b) Special Schools
 - c) Specialist Inclusion Services
 - d) Other
- 2.8** Table 2 below summarises how the funding is allocated in 2022/23 across these are 4 areas

Table 2 – 2022/23 High Needs Block Requirement

Area of Spend	2022/23 Funding Requirement
Special Schools	£10,101,600
Special Educational Needs (SEN)	£14,195,660
Specialist Inclusion Services	£2,962,000
Other	£763,000
Total	£28,022,260

- 2.9** The High Needs Block is in a positive position due to considerable work in 2020/21 to reduce the spending on extra-district places along with an increase in funding in 2021/22 and 2022/23. Consequently, it was possible in 2021-22 to increase the top-up funding for pupils in mainstream schools by 10%, allow for an increase in special school places and a contingency to allow for increased services in response to the SEND review. Special Schools top up was increased to include pay and pensions grants and is being increased by a further 10% in 2022-23.

3. Main issues for Schools Forum

3.1 High Needs Commissioned Places

- 3.1.1** From September 2021 there were 429 commissioned places in maintained special schools, including Ravenscliffe Spring Hall post-16 provision. The number reflects admissions at phase transfer stages (Reception, year 6 and post-16), in-year

transfers from mainstream schools and children moving into the authority. This is an increase of 44 from 385 in September 2020.

3.1.2 Capacity at Wood Bank increased in Spring 2021 with the opening of the new block.

3.1.3 Table 3 below shows the funding required based on planned places (the schools retain any under/overspends).

Table 3: Special Schools High Needs Funding requirement

Schools (High Needs)	2022/23 Funding requirement	
Primary Special Schools		£4,622,400
Secondary Special school		£4,371,700
<u>Provision for Increase in pupil led funding</u>		£470,500
<u>Special Schools Supplementary Grant 2022-2023</u>		£187,000
<u>Contingencies:</u>		£450,000
Special schools - 14 places Primary to Secondary	£150,000	
New Growth - Changing rolls	£300,000	
TOTALS	£450,000	£10,101,600

3.1.4 The allocation assumes a level of contingency of £450k for growth in Special Schools.

3.1.5 Table 4 below shows the comparative growth from 2021/22 to 2022/23. It is assumed this will continue and an additional £150k is anticipated to be required to support the changes in roll in Sept 2023.

Table 4 Summary of place growth 2021/22 to 2022/23

Settings	2021/22	2022/23	Increase
Primary	174	205	31
Secondary	211	224	13
Totals	385	429	44

3.1.6 A further £300,000 contingency is identified to fund changing needs and higher numbers.

3.1.7 Places, in line with ESFA regulations, continue to be funded at £10,000 per place plus individual top up funding (see section 3.3).

3.1.8 In addition there are currently 80 commissioned places at The Whitley AP Academy. There are 9 commissioned places at Central Street Key Stage 1 ASD Resource Provision, 6 commissioned places at Cliffe Hill Key Stage 2 ASD Resource Provision and a further 10 places at the Key Stage 3 & 4 ASD Resource Provision at Trinity Academy Grammar.

3.1.9 The Highbury/Copley Satellite provision opened in September 2019 and continues to be at capacity with 10 pupils. This is block funded at £150K with additional top-up through individual EHC Plans (section 3.3). Feedback has been very positive in relation to it providing an alternative provision with the benefits of a special school place combined with those of a more mainstream approach and academic opportunity.

3.1.10 Additional work is underway for strategic special school place planning and the Inclusion Group, including school and parent representatives, will be planning additional provision, including for Social, Emotional and Mental Health (SEMH) needs and for behaviour support. £1m SEND development funding has been allocated to enable that work to ensure sufficiency of places, a suitable range of AP to meet children's needs, SEMH and behaviour support for mainstream schools.

3.2 Education, Health & Care Plans

3.2.1 In line with the national picture there has been a continued increase in the number of children & young people in Calderdale with an Education, Health & Care Plan (EHCP).

There are 1735 active EHCPs that are maintained by Calderdale, with 16 placed out of Authority (1751 total) as of 18/3/2022. This is an increase of 164 in total and a reduction of 4 being placed out of Authority over the past year.

3.2.2 A further 106 are currently within the 20 week assessment process.

3.2.3 150 new EHCPs have been issued since September 2021.

3.2.4 The breakdown of EHCPs by age is:
49 EHCPs in early years pre-Reception
715 in Reception to Y6
532 in Y7 -Y11
455 in Post-16

3.3 Special Educational Needs (SEN)

3.3.1 Special Educational Needs includes the SEN Assessment & Support Team, Top ups to schools, academies and the Alternative Provision Academy, payments to out of area and independent Special Schools and SEN Support provision.

3.3.2 Table 5 below shows the funding required in 2022/23.

Table 5 – SEN - High Needs 2022/23 Funding requirement

Specialist Educational Needs	2022/23 funding requirement	
SEN Assessment & Support Team		£750,000
SEN Case Officers/Local Offer		£100,000
SEN Development fund		£1,000,000
SEN High needs top ups to school EHC	£4,150,000	
Growth provision – EHC Plans top up	£300,000	
AP Academy – Top Up	£1,603,600	
		£6,053,600
School based ASD – Sowerby Bridge		£80,000
New ASD Unit – Rastrick		£115,000
Highbury Satellite provision		£175,000
New Primary Autism Unit		£120,000
Secondary Nurture Provision		£52,000
EHC Support		£1,400,000
Special/Extra District		£4,000,000
SALT Contract		£250,000
Hard to Place SEN Support		£100,000
TOTAL		£14,195,600

3.3.3 SEN Team - £750,000

Funding is required to support the assessment and coordination of SEN support on behalf of the Directorate.

The £750k reflects both the funding required for the Service Manager (SEN), the existing SEN Team and additional funding necessary to meet the continuing increase in SEN numbers. A review of the existing staffing establishment will be carried out to confirm future funding requirements.

3.3.4 Case Officers/Local Offer £100,000

Provision has been increased to provide more support to schools for SENCOs and for pupils at SEND Support and to ensure the Local Offer is provided.

3.3.5 SEN Development Fund - £1,000,000

Funding allocated to support the development of additional services or provision coming from recommendations of the SEND Review.

3.3.6 Top Up Funding - £6,053,600

a) SEN High Needs - £4,150,000

This is based on the current number EHC Plans as at January 2022 and a proposed increase of 4% in rates reimbursed to schools/academies. Top-up funding is the funding required, over and above the core funding a setting receives, to enable a pupil or student with high needs to participate in education and learning.

Top-up funding for pupils in mainstream schools will be increased by 4%, with effect from the new financial year 2022/23.

b) Top Ups Growth Provision - £300,000

It is estimated that a further £300k growth for top ups will be required to meet the increase in demand for EHCPs in 2022-23.

Table 6 - Number of EHC Plans

Setting	2019/20	2020/21	Increase
Primary	340	406	66
Secondary	238	264	26
Totals	578	670	92

c) Alternative Provision Academy - £1,603,600

This funding provides for the contract with The Whitley Alternative Provision Academy, including an increase in the top up figure for 2022-23 along with contingency for increased provision within Calderdale.

3.3.7 School based ASD – Sowerby Bridge - £80,000

This has been set in line with the existing SLA with Trinity Academy Grammar for the ASD resourced provision.

3.3.8 New ASD Unit – Rastrick - £115,000

Plans are underway to develop further resourced ASD provision at Rastrick High School. This funding provides for places, top ups and staffing for a part year effect.

3.3.9 Highbury Satellite provision - £175,000

This has been set in line with the existing SLA.

3.3.10 New Primary Autism Unit - £120,000

Provision has been made to establish a new Autism Unit for the Primary Sector.

3.3.11 Secondary Nurture Provision - £52,000

This is the contracted provision at Ryburn (£20k) and Brighouse (£32k).

3.3.12 EHC Support - £1,400,000

EHC Support is mainly Post-16 College provision for young people with EHC Plans and bespoke packages of support (including music therapy, horse riding, activities & sports).

Post-16 College provision has remained relatively stable in 2021/22 but a small element of growth is assumed for 2022/23.

This is a more cost effective & local based service provision compared to being placed in more specialist residential settings.

There is also a requirement to fund Specialist equipment & loan store, mediation, OT support and other one –off special support.

3.3.13 Special/Extra District - £3,700,00

This funds children being accommodated in special, independent and private provision both within Calderdale and out of area rather than in our own mainstream or maintained special schools.

3.3.14 SALT Contract- £250,000

This is the value of the existing commissioned service.

3.3.15 Hard to Place SEN Support £100,000

£100,000 funding is earmarked to enable the Directorate to meet the needs of pupils who do not have an EHCP but the Council has a statutory duty to put in place an alternative provision when required.

3.4 Specialist Inclusion Services

3.4.1 This includes the Specialist Inclusion Service, Vulnerable Learners Team, SENDIASS and the Medical Needs Team.

3.4.2 Table 7 below shows the funding required in 2022/23.

Table 7 – Specialist Inclusion - High Needs Funding requirement

Specialist Inclusion	2022/23 Funding requirement
Specialist Inclusion Service	£2,000,000
Vulnerable Learners Service	£62,000
Medical Needs Team	£240,000
SENDIASS	£60,000
Early Years Inclusion	£600,000
TOTALS	£2,962,000

3.4.3 The £2.962m is required to support the following areas:

- i) **Specialist Inclusion Service – £2m**
Funding is required to provide specialist services including the ASD Team, Resource Technicians and Sensory support. The service was restructured in January 2022 and a final review of the structure will take place in the summer term 202 prior to full roll out in September 2022.
- ii) **Vulnerable Learners - £62,000**
Part funds Service Manager Vulnerable Learners post
- iii) **Medical Needs Team - £240,000**
The team of 1fte Manager & 4FTE Teachers
- iv) **SENDIASS - £60,000**
This is funding the Calderdale contribution to the Joint Service with Kirklees and reflects the additional funding required for the recent approved regrading.
- v) **Early Years Inclusion - £600,000**
There is £600k earmarked from High Needs for inclusion work in Early Years.

3.5 Other

3.5.1 Funding has been allocated to support SEN Management information systems, overhead costs of providing the High Needs services and support for young people with SEND to make a positive transition to adulthood, including paths to employment, good adult health, independent living and participating in society.

3.5.2 £763,000 High Needs funding is required to support the Other category and is show in Table 8 below.

Table 8 – Other Services - Use of High Needs

Other	2022/23 Funding requirement
Capita One	£10,000
IT Development	£100,000
Commissioning Team	£43,000
Disabled Children's Team	£110,000
Running Costs - Overheads	£500,000
TOTALS	£763,000

3.5.3 The **£763k** is required to support these areas detailed below:

- i) **Capita One - £10,000**
The Capita One system provides information across Education, Early Years, Youth and Social Care. £10k is required for the element of Capita One used for High Needs areas.
- ii) **IT Development - £100,000**

This funding is identified to enable the development of new IT services to increase efficiencies complement the SIMS system already in schools and improve access for parents.

iii) **Commissioning Post - £43,000**

Funding is required for 1fte post 18 Development Officer within the Integrated Commissioning Unit to support young people with SEND to make a positive transition to adulthood, including paths to employment, good adult health, independent living and participating in society.

iv) **Disabled Children's Team - £110,000**

Funding is required to fund the existing 2.5fte Occupational therapy posts.

v) **Overheads - £500,000**

Funding is required to offset the Council overhead costs of providing the above services. These services include building costs, legal cost, commissioning/contracting costs, finance and HR/payroll costs etc.

4. Recommendations

Schools Forum is asked to note the content of the report and support the recommended use of the High Needs funding envelope for 2022/23.

5. Reasons for recommendations

Contained in this report.

6. Impact of funding, targets and milestones

Contained in this report.

7. Resource implications

Contained in this report.

8. Appendices

Appendix 1

Extract from Section 251 (Apprenticeships, Skills, Children and Learning Act 2009) **Guidance – Use of High Needs Budget**

Top up funding – maintained schools:

The planned expenditure on top-up funding for maintained schools, including pupil referral units (PRUs). Top-up funding is paid to schools for pupils with high needs in mainstream classes, in special units and resourced provision attached to mainstream schools, in special schools and in PRUs and in sixth forms. Top-up funding is usually administered directly by local authorities from a central high needs budget. Where such funding has been devolved to schools for them to decide what to pay other schools (for example, when a school pays top-up funding for a pupil it places in a PRU), this funding should also be included.

Top up funding – academies, free schools and colleges:

Top-up funding is paid to academies for pupils with high needs in mainstream classes, in special units and resourced provision attached to mainstream academies and free schools, in special academies and free schools in alternative provision academies and free schools, and in academy and free school sixth forms. Top-up funding for students with high needs in further education colleges, sixth form colleges and local authority post-16 provision should also be included in this line, in the post-school column. Top-up is usually administered directly by local authorities from a central high needs budget.

Top-up and other funding – non-maintained and independent providers:

The planned expenditure on top-up funding for non-maintained special schools, and planned expenditure on pupils with SEN statements or education, health and care (EHC) plans at independent schools, including pupils in sixth forms.

Additional high needs targeted funding for mainstream schools and academies:

The planned expenditure from the authority's high needs budget which is given to mainstream schools and academies to ensure that they have enough funding to meet additional support costs up to £6,000 for pupils with **SEN**, where they cannot reasonably do this out of their budget share. Local authorities were asked to give more detailed information about such targeted funding in their APT return. More information on the APT is available.

SEN support services:

Include the costs of non-delegated centrally retained specialist SEN support services for pupils with or without statements or EHC plans, whether supported directly by the local authority or commissioned by them. This will include services for visual, hearing and physical impairment, specific learning difficulties, speech, language and communication, profound and severe learning difficulties, and autism. You should include:

- Costs of these services for 0-5 year olds.

- Costs of providing these services to home educated children.
- Costs of early years SENCOs who are centrally managed across a number of early years providers.

Hospital education services:

hospital education is defined in the regulations as education provided at a community special school or foundation special school established in a hospital (usually called a hospital school), or under any arrangements made by the local authority under section 19 of the Education Act 1996 (normally provision in PRUs or services centrally managed by the local authority, where the child is being provided with such education by reason of a decision made by a medical practitioner).

Only include expenditure on hospital education services. It should include both services made available to children and young people resident in the local authority's area and services made available to those who are in the area because that is where they are receiving their health care. It should also include expenditure on the local authority's pupils who are receiving their education from an independent hospital education provider.

Other alternative provision (AP) services:

include planned expenditure on AP services provided directly or commissioned by the local authority. This may include funding for home educating parents. Also include funding for AP providers other than PRUs, AP academies and AP free schools. Include funding for commissioned services delivered by PRUs, AP academies and AP free schools, but exclude any funding for places at these AP providers (which should instead be included in line 1.0.1 and specified in table 2) and any top-up funding in respect of pupils at these providers (see lines 1.2.2 and 1.2.3).

Support for inclusion:

- Collaboration between mainstream and special schools and primary and secondary schools to enable children with special educational needs to take part in mainstream activities.
- Devolved expenditure for the integration of children from specialist to mainstream settings and the provision of discrete services or projects to promote such integration, such as commissioned outreach services.

Do not include recharges or the cost of monitoring SEN provision.

Special schools and PRUs in financial difficulty:

include expenditure on assisting special schools and PRUs in financial difficulty.

Therapies and other health related services:

include costs associated with the provision or purchase of speech, physiotherapy and occupational therapies. Include any expenditure on the provision of special medical support for individual pupils which is not met by a Primary Care Trust, National Health Service Trust or Local Health Board.

National funding formula - link

[implementing the direct national funding formula \(NFF\) for mainstream schools](#)

Report to Schools Forum

Meeting Date	30 June 2022
Subject	School balances as at 31 March 2021
Report Author	Jane Davy

Report purpose
To provide Schools Forum with the final revenue balances for all maintained schools at the end of the 2021/2022 financial year.

Need for consideration
Schools Forum to consider and give a view on the report

Need for decision
N/A

Contact Officers
<i>Jane Davy-LMS Finance Manager</i> Jane.davy@calderdale.gov.uk 01422 393543

Report to Schools Forum

1. Background information and context

- a) All schools hold revenue balances at the end of each year to allow for unforeseen events and emergencies, and in some cases to smooth out the effects of changes in school rolls, changes to staffing structures and one off expenditure such as building work.
- b) The Council holds separate reserves or balances to cover the same events for all other Council expenditure. Schools are specifically excluded from the use of these balances and therefore need to maintain their own balances.
- c) The Audit Commission has previously monitored the overall levels of school balances nationally and recommended schools maintain balances of no more than 5% of planned budget in secondary schools and 8% of planned budget in primary and all special schools. Calderdale agreed the introduction of its balance control mechanism in September 2010, for introduction in 2011.
- d) This report covers Calderdale's 54 maintained schools (1 through school, 1 secondary, 49 primary and 3 special schools) and excludes academies that are subject to separate Education and Skills Funding Agency (ESFA) monitoring.

2. Main issues for Schools Forum

- a) Schools initially projected collective surplus balances of £6.43 million as at 31st March 2022. Their recent spring term monitoring statements projected revised surplus balances of £8.15 million.
- b) The accounts for all schools are now closed and the overall level of balances in Calderdale's 54 maintained schools (excluding community focused balances) is £9.47 million. Within this sum the amounts per sector are primary £6.56 million, secondary £1.18 million, and special £1.7 million.

This is an overall increase in balances on last year of £872k. A summary of the revenue balances held by each sector compared to last year is shown below (adjusted for academy conversions in year):

	Balances as at 31 March 2021	Movement	Balances as at 31 March 2022
	£000's	£000's	£000's
Primary	6,790	-204	6,586
Secondary	486	+696	1,182
Special	1,320	+380	1,700

Total	8,596	+872	9,468
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- c) In the secondary school sector, there are two LA maintained schools, both of which have increased their surplus, one of which is now over the recommended threshold.
- d) In the primary sector balances have slightly reduced overall, one school has a small deficit the others are all in surplus. 33 schools are holding balances above the recommended threshold. 5 schools are holding balances less than £40k, budgets for these schools, 1 of which is less than 2%. These schools will be looked at in detail and they will be monitored more closely if required.
- e) In the special school sector, balances have increased, all 3 special schools are over the recommended threshold.
- f) A summary of the average balance as a percentage of total funding for each sector and the number of schools currently above recommended threshold is set out in the table below:

	Position at March 2021		Position at March 2022	
	Balances as % of total funding	Number of schools above threshold	Balances as % of total funding	Number of schools above threshold
Primary	12.4%	33	11.82%	33
Secondary	3.92%	0	8.77%	1
Special	15.94%	3	18.37%	3
Overall Total	8.68%	36	12.07%	37

- g) The Local Authority, in consultation with Schools Forum, introduced a balance control mechanism in 2011. In the first two years of the mechanism schools with balances above the recommended threshold were required to provide evidence of their commitments and some were subject to time limited arrangements at the end of 2011/12. However, Schools Forum agreed to suspend the balance control mechanism for 2020/21 and 2021/22 a report follows on the agenda for members to review the requirement to continue from 2022/23.
- h) A summary of individual school balances is shown in Appendix A, 37 are above recommended threshold. 4 schools have set budgets that will reduce the balances below the threshold by 31 March 2023, a further 14 schools will reduce by 31 March 2024 and a further 9 schools by March 2025. 10 school will remain over the recommended threshold as at March 2025.

3. Recommendations

- a. Members note the maintained schools' balances as at 31 March 2022.
- b. A further report is brought to the December meeting based on Autumn 2022 projections

Reasons for recommendations

To enable members to give a view on maintained balances and the implementation of the clawback mechanism for schools consistently over the recommended threshold.

4. Impact of funding, targets, and milestones

None unless Clawback mechanism is implemented.

5. Resource implications

None unless Clawback mechanism is implemented.

6. Appendices

Appendix A: Individual School Balances – 3 Year Summary to adjust

School Forum has asked LA officers to review the mechanism and ask other northern local authorities (LAs) about their policies.

To date we have had 26 responses of which:

12 LAs do not currently have a CM

9 LAs have a CM but have not yet clawed any monies back (including Calderdale)

5 LAs have a CM and clawed back

The responses are included in appendix B1 but of the 5 LAs that have invoked the CM, the following comments were received:

Blackburn and Cumbria – sent no feedback

Bradford - This has the 'threat' of clawback, but we don't actually often do this. The main purposes of the scheme are to improve budget planning (and discussion with governors) and to improve the accuracy of monitoring of budgets during the year. The scheme has been relatively successful in doing this.

East Cheshire - clawed back £1,272 in 19/20 from one school, was not popular decision. It was used as additional funding for SEN , suspended it for 20/21 due to COVID. Had issues with how to recirculate the funding to all schools when only maintained affected , so used it for SEN.

Manchester clawed back from 26 schools total of £1.443m from 18/19, currently suspended. It funded DSG deficit.

Next Steps

- 1) Schools Forum needs to determine if it wishes to continue with the CM when Academies do not currently have any system in place to address high balances and many neighbouring LAs don't have a CM or don't implement it.
- 2) If the answer to the above question is yes then a review of the CM is needed, it was suggested that a working group would be set up to review the following:
 - a) Thresholds- How these are to be calculated?
 - b) Balances – what do we take account of in calculating the overall surplus for example do we deduct balances from ring fenced grants, unspent donations and income generating activities such as Before and After School clubs?
 - c) Do we allow schools to earmark for specific purposes such as a capital scheme?
 - d) What will be the clawback procedure?
 - Presumably LMS team will do the initial report and then will it go to Senior LA officers or School Forum for a decision?
 - Will the school have an opportunity to present a case and or appeal?

- Who will make the final decision on clawback and or the amount?
 - What and who will decide what any claw backed funds will be used for?
- 3) Following agreement on the above, LMS will write the new policy which Schools Forum need to ratify and all maintained schools will have to be consulted upon. The Scheme for Financing Schools will then be amended.
 - 4) It will need to be ratified at the November 2021 Schools Forum meeting to allow time for consultation and approval if it is to be applied to 2021/22 balances.

School Name	Balance as at 31st March 2020		Balance as at 31st March 2021		Balance as at 31st March 2022	
						Projected
	Final Surplus	Year end Balances	Final Surplus	Year end Balances	Final Surplus	year end Balances
	£	%	£	%	£	%
PRIMARY SCHOOLS						
All Saints' CE (VA) J & I School	100,607	11.88%	107,218	12.01%	123,215	12.42%
Ash Green Primary School	327,358	13.00%	418,868	15.30%	267,785	9.44%
Bailiffe Bridge J & I School	114,699	13.53%	120,178	13.43%	117,149	13.00%
Barkisland CE (VA) Primary School	48,459	6.17%	64,429	7.83%	61,127	7.22%
Carr Green Primary School	55,072	7.68%	54,784	3.62%	-11,760	-0.73%
Castle Hill Primary School	145,347	10.33%	175,098	14.67%	202,426	18.52%
Central Street Infant & Nursery School	109,337	24.66%	172,102	36.51%	148,585	31.03%
Christ Church (Pellon) CE (VC) Primary School	126,759	11.04%	199,100	16.10%	82,608	6.61%
Christ Church CE (VA) Junior School (Sowerby Bridge)	94,161	13.20%	64,053	8.68%	28,455	3.88%
Cliffe Hill Community Primary School	59,419	5.17%	73,991	5.96%	56,762	4.44%
Colden J & I School	28,003	6.32%	35,915	7.00%	7,333	1.54%
Copley Primary School	111,430	11.05%	157,578	14.24%	195,420	15.76%
Cornholme J, I & N School	69,106	6.98%	54,319	5.23%	92,335	8.64%
Cross Lane Primary School	131,291	13.26%	138,599	8.41%	146,430	9.00%
Elland CE (VA) J, I & N School	114,877	10.80%	151,700	13.88%	191,671	17.52%
Ferney Lee Primary School	19,282	1.72%	72,489	6.19%	122,441	10.36%
Hebden Royd CE (VA) Primary School	104,738	18.52%	104,107	21.07%	83,592	16.65%
Heptonstall J, I & N School	6,303	1.42%	36,370	7.65%	38,783	8.43%
Holywell Green Primary School	77,740	8.20%	123,761	12.54%	82,789	8.51%
Lee Mount Primary School	-16,778	-0.98%	56,379	3.13%	81,783	4.31%
Ling Bob J, I & N School	235,730	12.09%	388,789	19.49%	269,575	13.46%

Longroyde Junior School	84,565	4.86%	82,734	4.41%	56,823	3.15%
Luddenden CE School	42,418	5.24%	70,368	8.32%	138,264	16.18%
Midgley School	91,347	18.15%	138,302	25.85%	164,481	31.00%
Moorside Community Primary School	167,786	11.87%	293,539	19.49%	257,211	18.76%
New Road Primary School	128,693	16.02%	173,779	21.30%	189,126	23.07%
Norland CE (VC) J & I School	111,351	21.98%	124,982	23.96%	137,037	26.11%
Northowram Primary School	72,439	4.03%	150,401	7.81%	200,988	9.76%
Old Town Primary School	45,601	9.23%	66,529	13.46%	63,582	13.30%
Parkinson Lane Community Primary School	469,919	16.37%	634,328	21.54%	764,743	25.77%
Ripponden J & I School	68,169	7.74%	93,226	10.31%	110,443	11.59%
Riverside Junior School	152,197	18.14%	213,571	26.25%	231,147	28.80%
Salterhebble J & I School	54,840	6.03%	42,654	4.49%	45,011	4.41%
Savile Park Primary School	133,124	6.11%	209,066	8.77%	283,313	11.42%
Shade Primary School	33,140	3.38%	73,221	7.15%	39,934	4.18%
Shelf J & I School	22,790	2.00%	37,497	3.28%	47,380	4.15%
St Andrew's CE (VA) Infant School (Brighouse)	125,971	18.25%	78,191	10.82%	64,943	7.71%
St Andrew's CE (VA) Junior School (Brighouse)	235,767	22.54%	243,472	22.23%	142,071	13.04%
St Augustine's CE (VA) J & I School	23,286	2.47%	65,039	7.40%	37,629	4.49%
St Mary's CE (VC) J & I School (Sowerby Bridge)	42,008	8.63%	130,011	25.01%	128,313	24.01%
St Michael & All Angels CE Primary School	73,044	7.77%	74,805	7.72%	56,131	5.61%
Stubbings Infant School	102,898	27.84%	126,498	36.94%	107,401	36.16%
Todmorden CE (VA) J & I School	91,044	8.17%	155,121	12.82%	224,989	17.89%
Triangle CE (VC) Primary School	97,821	12.12%	133,608	15.34%	126,587	14.32%
Tuel Lane Infant School	64,401	10.64%	70,417	64.72%	33,850	6.01%
Walsden St Peter's CE (VC) Primary School	136,071	17.31%	136,486	17.24%	174,053	19.38%
Warley Town School	73,717	12.33%	84,776	13.71%	63,576	10.16%
Withinfields Primary School	22,817	1.42%	84,351	4.98%	89,933	5.42%

Woodhouse Primary School	203,164	12.59%	233,923	13.29%	218,017	11.45%
TOTAL PRIMARY SCHOOLS	5,033,324	9.67%	6,790,722	12.43%	6,585,479	11.82%
		31		33		33

School Name	Balance as at 31st March 2020		Balance as at 31st March 2021		Balance as at 31st March 2022	
	Final Surplus	Year end Balances	Final Surplus	Year end Balances	Final Surplus	Year end Balances
	£	%	£	%	£	%
SECONDARY SCHOOLS						
CALDER HIGH SCHOOL	-94,218	-1.47%	422,557	5.83%	952,621	12.01%
TODMORDEN HIGH SCHOOL	-256,485	-5.56%	63,688	1.24%	229,481	4.14%
TOTAL SECONDARY SCHOOLS	-350,703	-3.19%	486,245	3.92%	1,182,102	8.77%
		0		0		1

School Name	Balance as at 31st March 2020		Balance as at 31st March 2021		Balance as at 31st March 2022	
	Final Surplus	Year end Balances	Final Surplus	Year end Balances	Final Surplus	Year end Balances
	£	%	£	%	£	%
SPECIAL SCHOOLS						
HIGHBURY SCHOOL	238,205	11.50%	300,399	12.87%	417,747	17.52%
RAVENSCLIFFE HIGH SCHOOL	1,010,525	27.43%	693,068	16.95%	529,095	11.85%
WOODBANK SCHOOL	153,593	9.18%	326,706	17.57%	753,370	31.28%
TOTAL SPECIAL SCHOOLS	1,402,323	18.88%	1,320,173	15.94%	1,700,212	18.37%
		3		3		3

TOTAL ALL SCHOOLS	6,084,944	8.68%	8,597,140	11.46%	9,467,793	12.07%
		34		36		37

* schools holding substantial extended school balances that would take them over the recommended threshold.

Report to Schools Forum

Meeting Date	30 June 2022
Subject	Maintained Schools Three Year Budget Plans
Report Author	Jane Davy

Report purpose
To provide Schools Forum with the estimated revenue balances for all maintained schools following receipt of their budget plans for the next three years.

Need for consideration
For School Forum to consider the budget plans of all maintained schools.

Need for decision
N/A

Contact Officers
<p>Jane Davy-LMS Finance Manager Jane.davy@calderdale.gov.uk 01422 393543</p>

Report to Schools Forum

1. Background information and context

- a) The Scheme for Financing Maintained Schools requires maintained schools to submit a three-year budget statement by the beginning of May, detailing how school resources are planned to be spent. These statements also show estimated school balances at the end of each year.
- b) The Scheme also requires school budget plans to be approved each year by the Local Authority. This is generally light touch but facilitates more work being undertaken where budget deficits are being projected.

2. Main issues for Schools Forum

- a) At the start of the 2022/23 financial year there were 54 maintained schools in Calderdale (1 Secondary, 1 through, 49 Primary and 3 Special schools). By the deadline date for receipt of returns (1st May 2022) 39 (68%) budget statements had been received, all remaining returns have now been received. However, 12 (22%) budget statements were more than 10 days past the deadline. At the time of writing the report 52 schools have had letters approving their budgets, 1 school that was a late submission will receive a letter approving their budget in due course, the final school has submitted a deficit budget, they have been written to asking for further information along with a requirement to have a robust and sustainable recovery plan that then has to be agreed by both the Head of Finance and the Director of Children and Young Peoples' Services.
- b) The budgets of 5 primary schools (including the aforementioned school), plan to have balances less than 2 % and are a cause for concern. These schools are being contacted directly and will be monitored closely. 4 primary schools have had their budgets approved but with a request to look at future years budgets and resubmit budget plans in October 2022. 16 schools have had their budgets approved but have been asked to look at future planning due to unsustainable in year deficits which the surplus carry forward cannot maintain. 3 School plans to hold more than the 8% threshold by March 2025, these schools have been reminded that funding should be spent on the current pupils in school. 2 further schools have balances over 8% threshold by March 2025. However, these are small schools with less than £60k balance and as such have had their budgets approved.
- c) For the 49 primary schools, total balance available as at 31 March 2022 were £6.6m (inc extended schools). In setting their 2022/23 budgets this is planned to reduce to £5.1m by the end of the financial year.
- d) For the 2 maintained secondary schools the total balances available at 31 March 2022 were £1.2m. In setting their 2022/23 budgets this is planned to increase to £1.6m by the end of the financial year.

- e) For the 3 maintained special schools the total balances available at 31 March 2022 were £1.7million. In setting their 2022/23 school budgets, maintained special schools plan to reduce these balances to £1.2m.
- f) For the longer 3-year period, 23 Primary schools are showing deficit balances. However, schools have been prudent with projected income and based their budgets on known funding available, due to the lack of information on how much the increase in funding will be. If the increase in income is not sufficient, these schools will have to look at reducing their expenditure from 23/24 onwards.
- g) At the time of presenting this report to Forum all schools (except 1) should have received a letter confirming that their submitted budget for 22/23 has been approved, some of those letters sound caution around the longer term projections and advise schools of the need to re-examine their plans for future years.

3. Recommendations

Members note the original budget projections and receives further updates during the financial year.

4. Reasons for recommendations

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

5. Impact of funding, targets, and milestones

None.

6. Resource implications

None.

7. Appendices

None.

Report to Schools Forum

Meeting Date	30 June 2022
Subject	Clawback Mechanism
Report Author	Jane Davy

Report purpose
To provide Schools Forum with information on the current Balance Control Mechanism.

Need for consideration
For School Forum to consider reinstating the Balance Control Mechanism for 2022/23 financial year.

Need for decision
Members to decide on reinstating the Balance Control Mechanism.

Contact Officers
<i>Jane Davy-LMS Finance Manager</i> Jane.davy@calderdale.gov.uk 01422 393543

Report to Schools Forum

1. Background information and context

- a) The Scheme for Financing Maintained Schools states “Schools Forum at its meeting in February 2013 agreed to retain the mechanism but not to operate it unless total balances were seen to be rising or individual schools were perceived to be persistently disregarding the recommended thresholds. Schools Forum retain the right to hold individual schools to account if necessary”.
- b) At the June 2021 meeting Schools Forum at their request were presented with a briefing paper on the balance control mechanism, see Appendix A. Following a vote, members agreed to suspend the right to clawback funds for another year and to revisit again for 2022/23 at the June 2022 meeting.

2. Main issues for Schools Forum

- a) Maintained school balances have risen again during 2021/22, with 37/54 schools being over the current recommended threshold of 8% and 5% of Government funding (I01-I05) for Primary/Special schools and Secondary schools respectively. As reported on earlier in the agenda many of these schools plan to reduce their balances with only three schools remaining over the recommended threshold by March 2025. However, based on historical trends, it is likely that there will be more schools over the threshold in future years.
- b) Members need to decide what action they wish to take, LA Officers have identified three options to be considered.
 - i. Suspend the balance control mechanism for another year due to the uncertainty around funding, pay increases, energy prices and the current inflationary pressures.
 - ii. Reinstate the balance control mechanism due to school balances continuing to rise and the number of schools over the current recommended threshold.
 - iii. Reinstate clawback with new criteria. The ESFA have recently advised academies, that any academy holding balances over 20% of ALL income, will be asked a series of questions when they submit their budget returns in summer 2022. At the time of writing the report it is not known what action, if any, will be taken regarding clawback of funds. Based on this threshold, Calderdale currently have 6 maintained schools that would become subject of a review.
- c) If members vote for option ii or iii further considerations will need to be taken into account, these are mentioned in Next steps from 2c onwards in the briefing paper presented last year (Appendix A refers).

1. Recommendations

- a. Members to discuss and vote on Options above.
- b. Depending on the result of the vote a further report will need to be brought to the Autumn meeting setting out the criteria which will then require a consultation with all maintained schools.

4. Reasons for recommendations

School Forum under the scheme for financing school retain the right to hold individual maintained schools to account.

5. Impact of funding, targets, and milestones

Will be dependant on the result of the vote, some schools may have funding clawed back in 23/24. This can not be quantified until the outcome of the vote is known and the criteria agreed upon for any schools over the set threshold.

6. Resource implications

None.

7. Appendices

Appendix A

School Forum has asked LA officers to review the mechanism and ask other northern local authorities (LAs) about their policies.

To date we have had 26 responses of which:

- 12 LAs do not currently have a CM
- 9 LAs have a CM but have not yet clawed any monies back (including Calderdale)
- 5 LAs have a CM and clawed back

The responses are included below but of the 5 LAs that have invoked the CM, the following comments were received:

- Blackburn and Cumbria – sent no feedback.
- Bradford - This has the 'threat' of clawback, but we don't actually often do this. The main purposes of the scheme are to improve budget planning (and discussion with governors) and to improve the accuracy of monitoring of budgets during the year. The scheme has been relatively successful in doing this.
- East Cheshire - clawed back £1,272 in 19/20 from one school, was not popular decision. It was used as additional funding for SEN , suspended it for 20/21 due to COVID. Had issues with how to recirculate the funding to all schools when only maintained affected , so used it for SEN.
- Manchester clawed back from 26 schools total of £1.443m from 18/19, currently suspended. It funded DSG deficit.

Next Steps

- 5) Schools Forum needs to determine if it wishes to continue with the CM when Academies do not currently have any system in place to address high balances and many neighbouring LAs don't have a CM or don't implement it.
- 6) If the answer to the above question is yes then a review of the CM is needed, it was suggested that a working group would be set up to review the following:
 - e) Thresholds- How these are to be calculated?
 - f) Balances – what do we take account of in calculating the overall surplus for example do we deduct balances from ring fenced grants, unspent donations and income generating activities such as Before and After School clubs?
 - g) Do we allow schools to earmark for specific purposes such as a capital scheme?
 - h) What will be the clawback procedure?
 - Presumably LMS team will do the initial report and then will it go to Senior LA officers or School Forum for a decision?
 - Will the school have an opportunity to present a case and or appeal?
 - Who will make the final decision on clawback and or the amount?
 - What and who will decide what any claw backed funds will be used for?

- 7) Following agreement on the above, LMS will write the new policy which Schools Forum need to ratify and all maintained schools will have to be consulted upon. The Scheme for Financing Schools will then be amended.
- 8) It will need to be ratified at the November 2021 Schools Forum meeting to allow time for consultation and approval if it is to be applied to 2021/22 balances.

Local Authority	Clawback Operating	Thresholds Primary, Special & AP	Thresholds Secondary	Method of Deduction	Right of Appeal	Other	Use of clawback
Blackburn	Y	Higher of 12% SBS & PP or £60K	Higher of 10% SBS & PP or £60K	Deducted from current years SBS	Y	Any deductions due to a previous clawback are taken into account of the calculation	returned to the Schools Budget
Blackpool	N						
Bolton	Y	10%	8%				
Bradford	Y	Higher of 6% of I01 to I05 or £60k	4% of I01 to I05	Deducted from the next available funding allocation	N	Certain circumstances with approval are taken into account where excess balances can be held e.g. RCCO , spend to save scheme, loss or expansion of pupil numbers. Balances as at 31 March exclude ring fenced grants and any excess income raised from facilities and services .e.g. OOSC. Administered by the School Funding team but overseen by a sub group of school forum who will consider the case (schools at risk can attend the meeting). After each case the sub group inform Forum and this then will go to Council Exec committee for a final decision. Although have a scheme, don't often implement its more a threat to improve budget planning	returned to the Schools Budget for re-allocation to schools by the Schools Forum
Bury	N						

Calderdale	Y	Higher of 8% of I01 to I05 or £40k	Higher of 5% of I01 to I05 or £40k		Y	Schools are written to asking them to provide evidence of what the balances are to be used for.	not applied
Cheshire East	Y	8% for two consecutive years of all funding except income generation	5% for two consecutive years of all funding except income generation			Allow schools to hold earmarked reserves which have to be spent in accordance with original proposals within three years.	to fund SEN Pressures
Cumbria	Y	Higher of 8% or £15k	Higher of 5% or £15k	Deducted from SBS	Y	any ring fenced grant balances cfwd, unspent donations and monies held on behalf of other schools are excluded. Allowed to earmark funding for specific schemes which can not be financed from one years budget or where work is scheduled for the Easter or Summer holidays this must be evidenced to asset or school improvement plans and reported to governors. Schools over the excess will be notified and have to complete a questionnaire Final decison made by Director of Childrens Services	School Forum Decision
East Yorkshire	N						
Halton	N						
Kirklees	Y	10% of SBS	8% of SBS			any school exceeding the threshold are asked to provide evidence of planned expenditure. Clawback is rare	School Forum consulted

Lancashire	Y	Higher of 12% of all Income or £60k	Higher of 12% of all Income or £60k			Apply 50% of excee in first year then 100% for all following years	
Liverpool	N						
Manchester	Y	Higher of 8% of SBS or £10k for more than two years	Higher of 5% or £10k of SBS for more than two years	Deduct from SBS	Y	will deduct any prior commitments, unspent ring fenced grants and earmarked for specific purposes authorised by the LA from the balance. Amount to be clawbacked is following consultation with School Forum, schools invited to discussions with the LA and a School Forum Member	DSG deficit approved by School Forum
North East Lincs	N						
Oldham	Y	8% of school funding allocations	5% of school funding allocations			Deduct any revenue for capital within next two years , to fund short term pupil reduction. Schools have to complete a questionnaire Minimal clawback	
Rochdale	Y	8% of SBS except schools with less than 180 pupils then 12% for two consecutive years	8% of SBS			continue to report on high balances but havent clawed back for years	
Salford	Y	12%	12%			not used	

Sheffield	N						
Stockport	Y					not used	
Tameside	N						
Trafford	N						
Wakefield	Y	Higher of 8% of SBS or £100k	Higher of 8% of SBS or £100k			involve School Improvement colleagues	
Warrington	N						
Wigan	N						
Wirral	N						

26

N

12

Y

14 6 of which stated although they had a mechanism it wasn't used

Report to Schools Forum

Meeting Date	Thursday 30 June 2022
Subject	Future Delivery of the Local Authority School Improvement Function
Report Author	Connie Beirne Interim Service Manager for Early Years, Schools Strategy and Performance

Report purpose

- a) To provide members of the Schools Forum with an overview of the White paper recommendations published in March 2022, for all schools to become part of a strong Multi academy trust by 2030
- b) To provide members with possible models of how the Local Authority will continue to provide its School Improvement Function from April 2023
- c) To advise members of the financial impact on the delivery of future Local Authority school improvement functions.

Need for consideration

The effective use of Dedicated Schools Grant funding in securing the local authority school improvement function through a robust and rigorous delivery model.

Need for decision

- a) This report is for information about the impact of the loss of the SIMBG in funding the existing School Effectiveness team to deliver their statutory duties.
- b) Information is provided to support decision making by Schools Forum about future delivery and funding for the school improvement function in Calderdale.

Contact Officers

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Connie Beirne - Interim Service Manager for Early Years and School Strategy and Performance
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Report to Schools Forum

1. Background information and context

- a) In March 2022, the government published a white paper titled, 'Opportunities for all: Strong schools with great teachers for your child' [Schools White Paper](#) The paper sets ambitious goals for pupils, with 90% of pupils leaving primary school by 2030 achieving the expected standard in reading, writing and maths. For KS4 pupils, the national GCSE average grade in both English Language and Maths increases to 5 by 2030. By 2030, the government wants to see strong families of schools and all schools to be part of a strong trust by 2030.
- b) The white paper also offers an invitation for local authorities to launch a new MAT, but this will be limited to areas with a shortage of existing trusts. Heads have been consulted in brief re: this possibility and there is interest amongst some headteachers. At the start of June, further information was published with local authorities who are interested being asked to put forward an expression of interest by 31 July 2022.
- c) In January 2022, Schools Forum received a report on proposed reforms for how local authorities school improvement functions are funded. A decision was made to provide the funding requested to allow the existing SE team to continue to carry out its statutory school improvement duties and continue to provide the additional activities to serve all schools including academies during 2022/23.
- d) School Forum asked for a paper to be brought to their June 2022 meeting providing models of the delivery of the school improvement function from April 2023 onwards.
- e) In terms of the operation of the **School Effectiveness Service during 2022-23**, we will:
 - Continue to deliver the Primary Subject Leaders programme led by existing headteachers
 - Schools will be asked to risk assess themselves following the summer examination results and will then be rated: Green, Amber and Red. There will no longer be the capacity to have a named officer for the previous Risk A and B schools and they will become GREEN. Support can still be sought from the service by these schools, but our statutory duty will be focussed upon those schools causing concern and support for them will be increased
 - No longer operate as an Appropriate Body for ECTs from September 2022 and all schools effected have been notified of this change. In fact, DFE have just put out consultation around LAs no longer acting as AB's but this role to lie firmly with the Calderdale & Kirklees Teaching School Hub
 - Deliver the new Headteachers programme as funded by the Partnership board
 - SEOs and associates will still be available to undertake Headteacher's Performance Management Reviews
 - SEOs and associates will still undertake commissioned work requested by schools

- SEOs and associates will speak to OFSTED regarding a school's inspection and will do their best to attend feedback
 - SEO's and associates will continue to respond to requests from schools to deliver training sessions/ conferences etc.
- f) As you are aware, Chris Sylge left the service on Friday 10 June and Christine Nicholson will be retiring from her post in August 2022.
- g) Recruitment of School Effectiveness Associates is under way and these include existing/retiring headteachers as well as consultants who have previously worked within the local authority. This will ensure that the team carry out its statutory school improvement duties and continue to provide the additional activities to serve all schools including academies during 2022/23.
- h) Our highly successful Primary Subject Leaders development programme has been and will continue to be delivered by existing Headteachers from within the borough. This supports and reinforces the system leadership model of providing school to school support.
- i) Our school clusters continue to provide the local authority's school to school support function effectively and again reinforces the system leadership model. There is no intention to change the existing cluster model approach.
- j) All headteachers have been invited to share their thoughts/views/questions via email and/or attend an open forum on Wednesday 22 June to discuss the **3 options** detailed within this paper. An invitation was also received from CASH to attend their conference on 24 June to discuss the options presented and receive feedback. As you will be receiving this paper ahead of these consultations, feedback will be shared with you at the meeting on the 30 June.

2. Main issues for Schools Forum

Need for consideration

- a) There will no longer be funding for the School Effectiveness team available through the SIMBG as this ceases in March 2023; so, funding is dependent upon the model chosen with funding to come out of the Dedicated schools grant (DSG) and/or the Central Schools Service Block (CSSB)
- b) The White paper's move for all schools to be part of a MAT by 2030
- c) Members will need to consider all 3 delivery options carefully, taking into account the feedback received from headteachers and the needs of our schools in the borough to provide the best educational opportunities for all our children and young people.

3. Options

- a) In terms of the operation of the service during 2023-2024, the suggested options are as follows:
- **Option 1:** Service delivery continues as of the 2022-2023 (funding will need to be provided via DSG)
 - **Option 2:** SE team's funded to continue to work with remaining maintained schools causing concern (Red and Amber), as it will take time for schools to convert and join MATs, with the funding for SI continuing to be devolved to clusters. More work being undertaken by the C&KTSH and other Curriculum Hubs and our Research school
 - **Option 3:** The LA will adopt a commissioning model and be less of a delivering organisation. It will act as a critical friend to all schools regardless of status. It will continue to commission School to School support that cannot be commissioned by the C&KTSH and continue to work closely with our school clusters.

4. Recommendations

- a) For School Forum members to take into consideration the changing educational landscape with regard to the white paper.
- b) For School Forum members to consider each option and receive feedback from headteachers as to their preferred option of delivery.

Reasons for Recommendations

- a) 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 2023 start date
- b) For a decision to be made, on the funding through DSG of the future chosen delivery model.

5. Resource implications

- a) All professionals, funding and resources to be in place by 31 March 2023.

Item 13



Schools Forum
Work Programme 2022/23

Prepared by

Paul Tinsley, Interim AD Education and Inclusion

Richard Morse, School Organisation and Access Manager

Meeting date	Venue	Reports		Deadline for papers
24 November 2022	Virtual	Election of Chair and Vice Chair – Ian Hughes	Decision	14 November 2022
		Forum Constitution and Terms of Office– Ian Hughes – verbal	Decision	
		Allocation of funding to school improvement clusters – half yearly impact report – Sue Williams	Information	
		School funding update report – Jane Davy	View/Consultation	
		Growth Fund and Falling Rolls report – Jane Davy	Decision	
		Briefing note on Fair funding for all Consultation report – Jane Davy - TBC	Information	
		Claw Back Mechanism – dependent on June Meeting – Jane Davy	Decision	
		Update on maintained schools balances – Jane Davy	View/Information	
		Pupil Planning document – Richard Morse	Information	
		Reforming how Local Authority school improvement functions are funded	Information	
		Capital Maintenance Briefing paper – Sue Williams	Information	
		Work programme	Information	
12 January 2023	Virtual	Early years block provision, central spend – Martyn Sharples	Consultation/Decision	19 December 2022

Meeting date	Venue	Reports		Deadline for papers
		Schools funding update – Jane Davy	Consultation	
		Falling Rolls – Jane Davy	Decision	
		Growth funding 2021/22 and 2022/23 – Jane Davy	Decision	
		Review of services to schools – Michael Holgate	Decision	
		Delegation of School improvement functions – Sue Williams/Connie Beirne	Decision	
		Allocation of 2022/23 Central Service Schools block (CSSB) central spend – Sue Williams/Steve Drake/Michael Holgate	Decision	
		De-delegation including Union facilities – Michael Benn/Jane Davy to present	Decision	
27 April 2023	Virtual	Allocation of Funding to School Improvement Clusters (half year report) – Connie Beirne	Information	17 April 2023
		Spend on High Needs Block provision including arrangements for commissioned places for pupils with Special Educational Needs – Sue Williams	Information	
		Maintained School Balances – Spring Monitor – Jane Davy	Information	
		Self-Assessment Feedback – Ian Hughes – verbal update	Discussion	
		Work programme	Information	
22 June 2023	Virtual Meeting	Scheme for Financing Schools and National Funding Formula – Jane Davy - TBC	Decision/Information/Discussion	17 June 2023

Meeting date	Venue	Reports		Deadline for papers
		Final Balances and 3-year Budget Plans – Jane Davy	Information	
		Claw Back Report – Jane Davy	Discussion/Decision	
		Work programme	Information	