

# Schools Forum

**Date:** 1 December 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) (Chair)

### 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 30 June 2022.**

To approve the Schools Forum minutes.

- |     |   |   |
|-----|---|---|
| 5.  | <b>Elect 2 Vice Co-Chairs</b>   | <b>Tony Guise</b>                         |
|     | Decision  |   |
| 6.  | <b>Forum Constitution and Terms of Office</b>   | <b>Tony Guise on behalf of Ian Hughes</b> |
|     | Decision  |   |
| 7.  | <b>Allocation of funding to school improvement clusters – half yearly impact report</b> | <b>Connie Beirne/Paul Tinsley</b>         |
|     | Information   |   |
| 8.  | <b>Reforming how Local Authority school improvement functions are funded</b>            | <b>Connie Beirne</b>                      |
|     | Information   |   |
| 9.  | <b>School Place Planning</b>  | <b>Richard Morse</b>                      |
|     | Information   |   |
| 10. | <b>School funding update report</b>   | <b>Jane Davy</b>                          |
|     | View/Consultation   |   |
| 11. | <b>Growth Fund report</b>   | <b>Jane Davy</b>                          |
|     | Decision  |   |

- |   |                      |
|---|----------------------|
| <b>12. Falling Rolls report</b><br><br>Discussion   | <b>Jane Davy</b>     |
| <b>13. School Balances – Autumn Monitor</b><br><br>View/Information   | <b>Jane Davy</b>     |
| <b>14. Capital Maintenance Briefing paper</b><br><br>Information  | <b>Richard Morse</b> |
| <b>15. Work Programme</b><br><br>Information  | <b>Paul Tinsley</b>  |
| <b>16. Any Other Business</b><br>Questions to be submitted a <b>minimum</b> 3 days prior to the meeting in writing to:<br><a href="mailto:CalderdaleSchoolsForum@calderdale.gov.uk">CalderdaleSchoolsForum@calderdale.gov.uk</a><br>Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair. | <b>Chair</b>         |
| <b>17. Future Dates</b><br><br>12 January 2023<br>27 April 2023<br>22 June 2023<br><br>All meetings will start at 4pm<br>Venue: TBC   | <b>Paul Tinsley</b>  |

**CALDERDALE SCHOOLS FORUM**  
**30 June 2022 – Virtual Meeting Via Teams**

**PRESENT:**

**Brenda Monteith** (Roman Catholic) – part of meeting  
**John Eccleston** (Academy)  
**Jo Buckley** (Primary Maintained)  
**Tony Guise** (Secondary Maintained) - Chair  
**Andrew Fisher** (Academy) – part of meeting  
**Richard Horsfield** (Academy)  
**Julia Gray** (Post 16)  
**Darren Senior** (Academy)  
**Gill Poole** (Unions)  
**Bill Montague** (Academy)

**IN ATTENDANCE:**

**Paul Tinsley** (AD Education and Inclusion)  
**Richard Morse** (Senior Commissioning Officer – School Organisation and Planning)  
**Jane Davy** (Finance Officer)  
**Michelle Thompson** (minute taker)  
**Michael Benn** – Finance – part of meeting  
**Cllr Adam Wilkinson** – Cabinet Member CYPS observer to forum

**APOLOGIES**

Karen Morley (Academy)  
Lesley Bowyer (Inclusion Adviser)  
Connie Beirne (Interim Service Manager for Early Years and School Strategy and Performance)  
Mungo Shepherd (Primary Maintained)  
Yvonne Carr (Unions)  
Dan Burns (Academy)  
Phil Hannah (Academy)  
Julie Kendall (Academy)  
Ian Hughes (Legal Officer)  
Steve Drake (Finance Officer)  
Adam McNichol (Primary Governors Maintained)  
Mary Carrigan (Primary Governors Maintained)  
Debbie Sweet (Special School)

**1. Substitutes nominated for this meeting and apologies for absence**

Alice Leadbitter for Mungo Shepherd  
Gill Poole for Yvonne Carr

## 2. **Members Interests**

Tony Guise, John Eccleston and Jo Buckley all declared interests.

## 3. **Admission of the Public**

Councillor Adam Wilkinson observing the meeting.

## 4. **Minutes of the Schools Forum held on 28 April 2022**

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

- CASH voted for CSSB to go to Partnership Board for schools to bid against.
- There is recognition that schools want more central services, however, there are concerns that schools will end up 'paying twice'. Add in maintained schools re-delegating further down the line.

Item 9 - Local Authority Redundancy Policy – covered in Item 10. Report to note.

Schools White Paper: opportunity for all and SEND and AP Green Paper – been through Government but what's missing is the implications on funding.

Minutes approved.

## 5. **Elect Chair and Vice Chair**

**Motion that Tony Guise be elected as Chair for this meeting and the forthcoming year is carried.**

Vice Chair – not required for this meeting but needs resolving before the next meeting in November.

Anyone interested to email Tony Guise. Tony to discuss legalities with Ian Hughes.

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

Report is for information – Paul Tinsley accepted questions on behalf of Connie Beirne.

Meeting discussed breakdown of allocation and impact reports. There is a significant variation in depth and quality of reports submitted by different clusters with lack of impact measures. Where there are impact measures, they are not measurable and qualitative only. Is it working and has the money enabled better outcomes for children in Calderdale?

Should there be some commonality in focused areas and how can the LA ensure the cluster officers are given those impact measures?

Would be helpful if there were some non-negotiables and training for cluster officers on what is and what isn't acceptable.

**Meeting agreed John Eccleston and Tony Guise to deliver message to Partnership Board.**

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

Question Refer Point 1.3 – what provision is there for EHE? Is there anything out of this funding that goes to support or the monitoring of EHE?

Answer – a small amount of funding for the LA is received but in terms of the rising numbers it falls short. Our statutory requirement is to visit families once a year. Unable to use the High Needs Block to support.

Refer Point 3.1.8 - ASD resources. Clarity and transparency required on how schools can fairly access the support (which is part funded through DSG).

Question Refer Point 3.3.5 – SEN Development Fund (£1m) set aside for recommendations. Is there any progress on this or do we have timescales to when this work will happen?

Answer – Inclusion Steering Group (working group 3) will be looking at the inclusion agenda, following the AP review and will feed into the Strategic Inclusion Group. The money will go to look at continuum of need and looking and gaps identified. Recommendations to address these gaps will be brought to the School Forum for ratification.

Question – is one of recommendations to have more hubs like we have at Copley?

Answer – yes, we are looking at having a range of hubs across the Borough to give broader access.

Schools Forum recorded that this is a growing area of concern. Despite significant SEN funding from the LA, there's a high level of dissatisfaction with support provided. Whilst it is acknowledged there are staffing issues, schools are not getting the right support. Meeting requested a future report outlining the recommendations, how the money is being used, the decision making process and the impact of the spend.

Schools Forum thanked officers for the report.

## **8. Self-Assessment Feedback**

Carry forward to November meeting.

## **9. National Funding Formula**

Consultation started 7 June and closes 9 September 2022. LA will respond and work will be undertaken over the summer period. Schools have the opportunity to participate either individually or as a formal Schools Forum body.

Question – What are the headlines, in terms of impact?

Answer – There will be no difference for us until 2024/25 (work on growth and falling rolls). Growth fund will be based on local decision but awaiting further information on how it will be funded.

Jane Davy to share LA's response with Schools Forum in November.

Schools Forum agreed that schools/governing bodies will contribute to the consultation separately.

## **10. Final Balances and 3-year Budget Plans**

Schools Forum highlighted the data showed a big inequality across schools.

Both Secondary schools have worked hard to get back into surplus and have been very careful with their money. Todmorden High have plans to spend some of theirs on a capital project for building improvements.

Schools Forum concerned re inequality and future budgets are an issue for many schools as they don't know what's happening with funding.

Some schools have done better over the past two years due to Covid and wrap around care, contributing to some of the balances.

Budget Plans – this has been one of the worst years of being able to budget due to so many unknowns. Some schools have asked we review budgets again in October. Schools Forum acknowledged the invaluable support Jane and the team continues to provide to schools.

Academies have access to SMRAs and some maintained schools. This is a free service. Maybe worth sharing a list of those using it with the Schools Forum.

Question – Is there any system in place for maintained schools, in terms of energy purchasing on a collective basis?

Answer – YPO used to do it but it was stopped a few years ago. We can look into this and report back to the next meeting.

## **11. Claw Back Report**

Meeting discussed report. Reminder this is only applicable to maintained schools.

Question – Even though we're not over 20% threshold still have to justify why there is the balance?

Answer - As long as you tell them the plans to spend then that's okay.

Schools Forum commented that whilst it is frustrating to hear that schools are holding onto surplus balances year on year, this is not the climate we should be thinking about clawing back from any school; everyone is in a shaky position with so many unknowns it would look harsh if the LA and Schools Forum were suggesting money is clawed back from schools at this point in time.

Schools Forum needs to agree how money would be re-distributed and look at instigating an element of balance control for all schools re option to clawback if surpluses held above threshold at the end of 3 years – this will be fair and show transparency but to be able to do this properly will take 12 months work.

**Schools Forum agreed to bring this work into the school budget process 2023.**

Schools Forum took formal vote on Options 1, 2 and 3 contained outlined within the report.



**Motion carried for Option 1, Suspend the balance control mechanism for another year due to the uncertainty around funding, pay increases, energy prices and the current inflationary pressures.**

## **12. Future Delivery of the Local Authority School Improvement Function**

Comments from Forum welcomed on the consultation on 3 Options outlined in the report.

Difficult to offer highlights from CASH as they felt they are still in the dark re options so it wasn't an extended discussion

Question – Has it been to CPHA?

Answer - Connie invited primary heads to the meeting to discuss this but it wasn't well attended. For those in attendance, there was a lot of anxiety about accountability and credibility and concern re school effectiveness officers to go into schools. Not representative of wider CPHA and would require further clarity on the options.

Chair requested Connie continues her work on developing these and Sue Williams (new AD, Education & Inclusion) can present at the November meeting, at which point we may be in a better position to vote or go to consultation for vote in the January meeting.

Question - The follow up stage 1 implementation doesn't mention any funding whatsoever?

Answer – Expecting a lot more information to come through in the summer holidays.

**Add to agenda for November meeting.**

## **13. Work Programme**

Remove agenda item Clawback Mechanism on November meeting.

Chair happy with work programme and suggests going forward it is a live document.

Question – does it covers all our statutory requirements?

Answer – yes and we can add items as and when required.

**Schools Forum agreed Work Programme subject to above amendment.**

## **14. Format for future Schools Forum Meetings**

Carry forward for discussion at the next meeting. Happy to continue on Teams.

## **15. Any other business**

None.

## **16. Future dates**

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

All meetings will start at 4pm via Teams.

Chair thanked Forum members for attending and getting reports out in timely manner and for having confidence in the Chair for next 12 months. Again, if anyone is interested in the Vice Chair role to get in touch with Tony, Helen or Ian Hughes.  
Have a lovely summer break.

# Report to Schools Forum

<b>Meeting Date</b>	1 December 2022
<b>Subject</b>	Allocation of Funding to School Improvement Clusters (half yearly report)
<b>Report Author</b>	Connie Beirne

<b>Report purpose</b>
<p>a) To provide members of the Schools Forum with a summary of the impact of funding allocated to each Cluster via the agreed formula across the academic year 2021/22.</p> <p>b) This report contains a summary of the information provided by clusters about the impact of funding.</p>

<b>Need for consideration</b>
<p>a) This report is for information about the effective use of the Dedicated Schools Grant funding in securing school improvement.</p> <p>b) Information is provided to support decision making by Schools Forum about future funding for the self-improving school cluster model in Calderdale.</p> <p>c) As the funding has been fully used, (October 22) is overdrawn at - £52,027.63 and no further funds are available. This means that no further bids will be able to be considered until the next financial year's allocation from April 1<sup>st</sup>, 2023. Some bids which were previously submitted but unable to be heard and approved by the board; will go forward first next financial year; if they are still requiring this funding and have not been able to fund it, from another funding stream.</p>

<b>Need for decision</b>
No decisions to be made at this time.

<b>Contact Officers</b>
<a href="mailto:Connie.beirne@calderdale.gov.uk">Connie.beirne@calderdale.gov.uk</a>

# Report to Schools Forum

## 1. Background information and context

- a) Calderdale's 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 the Dedicated Schools Grant (DSG) and on the impact of those allocations.
- b) A full breakdown of funding allocations is provided in **Appendix 1**. The total amount of funding provided for school improvement for the financial year 2021/22 was:

Ongoing DSG Funding	£364,000
One off Funding	£340,000
Brought Forward	£102,143
<b>Budget</b>	<b>£806,143</b>

### Funding for the financial year 2022-23 is:

Ongoing DSG Funding	£364,000
Additional one-off Funding from DSG Savings	£96,000
Brought Forward	£104,995
<b>Budget</b>	<b>£564,995</b>

- c) As these funds are top sliced from Calderdale's 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

- a) There was a carry forward of £104,995 from the financial year 2021-22. In the current financial year there is an overspend of - **£52,027.63 (Appendix 1)**. 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.
- b) A summary of the impact of allocations for funds is included in this report. Cluster officers provide an update at termly monitoring meetings and work with School Effectiveness Officers/Associates and local Teaching School Alliances and Hubs. School Effectiveness alongside Associates, deliver the Calderdale Subject Leaders Development Programme. The programme responds to the priorities across the Local Authority. With the return to statutory assessments during 2021/22, Clusters have been asked to sharpen their focus on being able to share clear and concise impact measures going forward.

- c) It is too soon to evaluate the impact of funding allocated after April 2022 (particularly regarding bids approved by the board) and these will be evaluated and reported in April 2023.
- d) Two maintained primary schools were eligible for the [Trust and school improvement offer](#) offer in 2022-23. Academies are contacted directly by the DfE. All eligible schools 2022/23 can access 3 days of School Improvement/trust support, via an NLE.
- e) The Local Authority's risk assessment process with regard to School Effectiveness has taken place this year. All primary schools were invited to self-assess themselves and 59 schools responded to the request. The School Effectiveness team, then using the school's own self-assessment, available data from July 2022 on individual school performance and other intelligence held on each school to identify a risk category of **GREEN** (of no concern to the LA), **AMBER** (of some concern to the LA) or **RED** (of high concern to the LA). There was a match of risk category with most school self-assessments, which shows the honest and open partnership working taking place.
- f) As Schools Forum were informed back in January 2022, the School Improvement Monitoring, and Brokerage Grant (SIMBG) continued to reduce due to schools converting to academy status. However, a decision was made that this grant would be halved to Local Authorities in April 2022 and will disappear in April 2023. Schools Forum made the decision to provide the additional funding needed of £142,000 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.
- g) In terms of the School Effectiveness team, a member resigned in June 2022 and another member retired in August 2022. School Effectiveness Associates were recruited to the team made up of consultants, retiring and currently serving Headteachers. The recruitment process was robust in terms of only Headteachers of **Green** be considered, submission of an expression of interest form and an accurate matching of SE associate to the right school.
- h) Due to these changes and our statutory duty to focus upon schools causing concern, only maintained **Amber** and **Red** schools, are allocated a School Effectiveness Officer/Associate and have a realistic time allocation reflecting the level of need. Officers/Associates are working closely with school leaders to plan appropriate work. The Interim Service Manager for Early Years, School Strategy and Performance meets termly with the Head and Chair of Governors of schools that are risk assessed as **amber** or **red** or in an Ofsted category.

### 3. Recommendations

- a) The Schools Forum accepts this report on the allocation of funding to school improvement clusters.
- b) It is recommended that the funding for the Calderdale self-improving school cluster model is maintained at least at the existing level of £364,000 to enable the continued

improvement in outcomes across all phases and an increase in the proportion of schools judged to be Good or better to bring it at least in line with national.

#### **4. Reasons for recommendations**

- a) Whilst the impact of funding allocation is evident through the improvements already secured, further work is required to ensure children in Calderdale achieve at least as well as their peers nationally at all statutory assessment points and are educated in schools that are at least Good.
- b) The pandemic has resulted in unprecedented challenges to all aspects of school effectiveness. Those challenges continue as schools work through recovery plans, in meeting the identified needs of their children. The self-improving school model is essential in supporting schools through this period.
- c) The previous inequalities for disadvantaged children and those with SEND have increased during the COVID-19 crisis and school improvement funding is required to support clusters and schools in closing those gaps.

#### **5. Impact of funding, targets and milestones**

- a) In summer 2022, primary assessment results are generally positive for Calderdale. The pandemic has seen most primary statutory assessment results decline across the country, with most national headline results dipping by more than six percentage points since 2019 when assessments were last concluded. Results in Calderdale have also declined but – generally to a lesser extent so that the outcome has been that Calderdale results are much closer to or above national than they were in 2019.
- b) Despite the change of framework, outcomes for Early Years, appear to be slightly above national (65.2%) at 65.4%.
- c) In terms of phonics, Calderdale year one pupils achieved a 79.3% compared to national of 75.5%.
- d) At KS1, a decrease was seen in performance but not as extreme as national and therefore narrowed the historic gaps at this stage.
- e) At KS2, only one headline figure increased nationally which was reading. Both maths and writing declined nationally and a similar reduction was seen in Calderdale, leaving the LA once again very close to national. KS1-2 progress is positive in all subjects. Reading +0.72, Writing +0.14 and Maths +0.93.
- f) Outcomes in secondary phase remain consistently strong.
- g) 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. This can be seen by the whole borough push on phonics and early reading.

- h) Funding enables clusters to be professional led by a Cluster Lead headteacher and a Cluster Officer (remunerated through cluster funding). As a result, the improvement plans are sharply focussed in clusters to ensure that local priorities are addressed, linked to the LA priorities and development plans. School Effectiveness provides challenge where plans are not clearly focussed.
- i) 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.
- j) Ofsted inspections commenced in September 2021. The proportion of schools judged to be Good or better in Calderdale is below that nationally. Schools that are currently not yet Good are expected to improve their judgement. 82% of Calderdale primary schools are Good or better compared to 88% nationally, Calderdale ranking 130/152 LAs. The picture at secondary phase is more positive, with 73% Good or better in Calderdale compared to 76% nationally, rank 71/152 LAs. Special schools and alternative provision are all at least Good and Calderdale ranks 1 for both groups of schools.

## **6. Resource implications**

- a) The funding for the self-improving school cluster model is having an impact on improving outcomes for children. It is currently funded through DSG which is reducing.

## 7. Appendices

### Appendix 1

#### Calderdale Partnership School Improvement Board

#### Funding Allocations 2021-22 and 2022-23

<b>Funding for Financial Year 2021-22</b>		<b>£</b>
On-going Budget		£364,000
One off Funding		£340,000
Underspend Brought Forward		£102,143
<b>Budget</b>		<b>£806,143</b>

#### 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 (North Halifax Grammar)		£131,669
Sowerby Bridge (St Mary's J&I Sowerby)		£40,521
Todmorden (Castle Hill J&I)		£32,924
Specials & AP (William Henry Smith)		£28,539
<b>Total</b>		<b>£421,228</b>

<b>Bids Agreed March 21</b>		
East Calderdale		£22,200
St. Augustines		£2,300
Sowerby Bridge		£8,970
<b>Total</b>		<b>£33,470</b>
<b>Total all funding</b>		<b>£806,143</b>
<b>Total allocations</b>		<b>£454,698</b>
<b>Balance available</b>		<b>£351,445</b>

<b>Bids Agreed July 2021</b>		
Elland Cluster		£22,675
Todmorden Cluster		£36,251
Trinity Academy Grammar		£5,280
Park Lane Academy		£8,000
North Halifax – Lee Mount school		£11,500



SPC – Training		£24,169
SBM Network		£2000
<b>Total</b>		<b>£109,875</b>
<b>Total all funding</b>		<b>£806,143</b>
<b>Total Allocations</b>		<b>£564,573</b>
<b>Balance Available</b>		<b>£241,570</b>

<b>Bids Agreed October 2021</b>		
Heartstone – 8 schools involved across 4 clusters		£29,000
SES – Curriculum		£7,200
Hebden Royd		£4,500
<b>Total</b>		<b>£40,700</b>
<b>Total all funding</b>		<b>£806,143</b>
<b>Total Allocations</b>		<b>£605,273</b>
<b>Balance Available</b>		<b>£200,870</b>

<b>Bids Agreed December 2021</b>		
Carr Green Primary and Salterhebble J&I schools		£14,800
Curriculum Leadership Bid – School Effectiveness Service		£6000
Sowerby Bridge Cluster		£12,500
<b>Total</b>		<b>£33,300</b>
<b>Total all funding</b>		<b>£806,143</b>
<b>Total Allocations</b>		<b>£638,573</b>
<b>Balance Available</b>		<b>£167,570</b>

<b>Bids Agreed March 2022</b>		
The Calder Learning Trust Reading and Literacy Strategy		£4,450
New Headteachers Support Package: School Effectiveness Service		£30,000
EEF/CPHA: Literacy		£18,125
Todmorden “Hard to reach families”		£10,000
<b>Total</b>		<b>£62,575</b>
<b>Total all funding</b>		<b>£806,143</b>
<b>Total Allocations</b>		<b>£701,148</b>
<b>Balance Available</b>		<b>£104,995</b>

<b>Funding for Financial Year 2022-23</b>	<b>£</b>
On-going Budget	£364,000
Additional one-off funding from DSG savings	£96,000
Underspend Brought Forward	£104,995
<b>Budget</b>	<b>£564,995</b>

<b>Cluster Funding - Allocation 2022-23</b>		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
<b>Total</b>	<b>£258,965</b>	<b>£34,000</b>

<b>Total all funding</b>	<b>£564,995</b>	
<b>Cluster Formula allocations – as above</b>	<b>£292,965</b>	
<b>Balance available</b>	<b>£272,030</b>	

<b>Bids approved July 2022</b>	<b>Amount</b>
Todmorden Cluster	£67,800
North Halifax	£57,765
East Calderdale	£82,092
School Effectiveness	£14,160
<b>Total</b>	<b>£221,817</b>
<b>Total All Funding</b>	<b>£564,995</b>
<b>Total Allocations</b>	<b>£514,782</b>
<b>Balance available</b>	<b>£50,213</b>

<b>Bids approved October 22</b>	<b>Amount</b>
Sowerby Bridge Cluster	£64,076.50
Christ Church Pellon Primary	£38,164.13
<b>Total</b>	<b>£102,240.63</b>
<b>Total All Funding</b>	<b>£564,995</b>
<b>Total Allocations</b>	<b>£617,022.63</b>
<b>Balance available</b>	<b>-£52,027.63</b> <b>Deficit</b>

**NB: The balance of funds is now in deficit, with the final two bids approved being paid. There is no further funding available, so this deficit will need to be carried forward to the next financial year 23/24. There will be no additional funds that schools can bid for at the December 22 and March 23 meetings of the SI Partnership Board. However, previous bids due to be considered during this financial year, will be considered**

## Appendix 2

### Impact of Allocation of Funding

There is no **Calderdale Secondary School Improvement Cluster (CSSIC) impact report for 2021/22** and this is due to one cluster officer leaving in June and another officer taking on the role from October 22.

### Calder Valley Cluster Summary of impact September 2022

**This is taken from the impact report completed for the Partnership Board (for more information about actions through the year and the mid-year progress please refer to the main plan).**

#### **FINAL IMPACT: Priority 1, Early Reading**

Ref No.	IMPLEMENTATION: OUTPUTS COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING	Ref No.	PUPIL OUTCOMES COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING
	<b>Medium Term/Long Term (September 2022)</b> <ul style="list-style-type: none"> <li>Early reading has been high priority at all CVC meetings this year, including the heads' meetings, English leaders, EY and SEND network.</li> <li>Schools have worked with other schools, visiting and looking at early reading. Heads completed an impact summary, they considered the benefit of working together to support reading and there were positive responses and schools have followed up any work, benefits included: <ul style="list-style-type: none"> <li>Raised profile of reading in school</li> <li>Working with another school highlighted area of practice they could adopt</li> <li>Working together on 'Transforming your school's reading culture' English Hub course, talked together and reflected of different stages of development of a reading culture</li> </ul> </li> </ul>	14	<ul style="list-style-type: none"> <li><b>TARGET: End of year phonics Year 1 above national</b> <ul style="list-style-type: none"> <li>Year 1 phonics outcomes are 9% above national (CVC 84.5%, national 75.5%)</li> <li>This is an increase since 2019 when CVC was 4.5% above national</li> <li>It is also noted that other reading outcomes have also increased the % above national.</li> <li>Key Stage 1 reading: 8.7% above national compared to 3.1% in 2019</li> <li>Key Stage 1 exceeding: 7.8% above national compared to 2.7% in 2019</li> <li>Key Stage 2 reading high score: 9.5% above national compared to 8.1% in 2019</li> </ul> </li> </ul>
		15	End of year phonics year 2 vast majority have met the standard-this is still being collated.
		16	Progress of disadvantaged pupil and pupils with SEND outcomes-data not analysed.

	<ul style="list-style-type: none"> <li>- Funding meant could have release time and create resources to implement recommendations</li> <li>- Listening to readers at another school and discussing issues and gains, gave a fresh perspective to their approach and issues</li> <li>- Sharing different approaches</li> <li>- Hearing from other heads about potential barriers to introducing a new SSP</li> <li>- Good to observe another head hearing children read</li> <li>• Schools can identify areas that have improved following implementation of actions from the audit of phonics</li> </ul>		
--	---	--	--

### **FINAL IMPACT: Priority 2, Mental health and wellbeing**

Ref No.	IMPLEMENTATION: OUTPUTS COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING	Ref No.	PUPIL OUTCOMES COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING
		6	EHNA indicates that pupils have been supported and figures improve for the areas of most concern-awaiting EHNA figures

### **FINAL IMPACT: Priority 3, Quality of Education**

Ref No.	IMPLEMENTATION: OUTPUTS COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING	Ref No.	PUPIL OUTCOMES COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING
	<ul style="list-style-type: none"> <li>• Some of this work was carried out, some heads visited each other.</li> <li>• Some subject leaders took the opportunity to watch the Ofsted research webinars, one school then put greater emphasis on disciplinary knowledge and adjustments made to music curriculum to be fully compliant with the Model Music Curriculum</li> <li>• One school worked with high school in the all through school</li> </ul>	2	<ul style="list-style-type: none"> <li>• <u>TARGET: Schools have evidence of how they are checking that pupils are knowing more and remembering more across the curriculum</u></li> <li>- This was evident in most of the schools that were inspected by Ofsted during the school year.</li> <li>- This has been regularly discussed at CVC meetings, and practice has been shared e.g. 'Revise and Revisit'</li> </ul>

	<ul style="list-style-type: none"> <li>• One head commented: 'A very supportive process with professionals genuinely wanting to help each other lead on school improvement'</li> <li>• 'Very useful mechanism for facilitating the sharing of good practice and effectively also moderating on judgements of how well we are doing'</li> </ul>		
--	--	--	--

## Finance Statement September 2022 (financial year April 2021-March 2022)

Income	
CF 2020/2021	£897
Cluster funding (including additional £2,000)	£31,920
<b>TOTAL</b>	<b>£32,817</b>

Expenditure	
Cluster Officer	£8,000
New head network X2 heads	£420
External English network leader	£600
Allocated to schools for school-to-school support for the cluster priorities: <i>reading, wellbeing, quality of education</i>	£19,575
Additional school allocations: <i>forest school subscriptions, work of Ofsted curriculum research reviews, speaking and listening</i>	£1,100
Admin (Midgley as budget holders)	£159
<b>TOTAL</b>	<b>£29,854</b>

<b>TOTAL REMAINING</b>	<b>£2,963</b>
------------------------	---------------

## East Calderdale Cluster Summary of impact September 2022

Cluster Plan; 2021 – 2022

Evaluation; Impact Report, September 2022

### Evaluation

End of year Impact Report

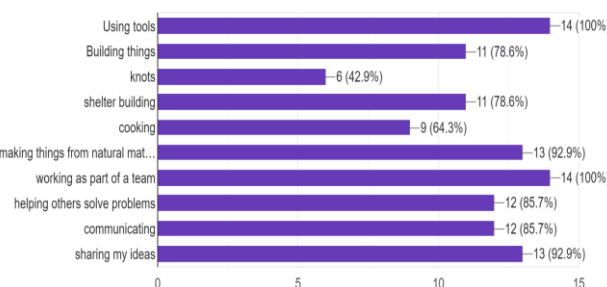
Cluster Impact Report
-----------------------

**P1 to “Sustain the recovery of vulnerable pupils, particularly disadvantaged and SEND learners, building on the core offer from the (LA) Primary Development Plan and (LA) Recovery Plan, to offer a menu of support and targeted interventions.”**

**P2 to “Sustain the recovery in core subjects, building on the universal work of the English and West Yorkshire Maths Hubs, to ensure that the curriculum (from EY to Y6) addresses gaps in pupils’ learning.”**

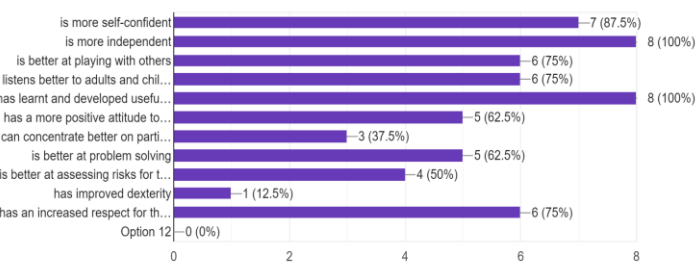
**Date: July 2022**

**Cluster: ECLC, Lead HT: Jill Elam, Cluster Officer: Clare Cheetham**

Outcomes	Impact Changes/developments	Action if not met
<p>Pupils selected to take part in Forest School sessions varied from school to school.</p> <ul style="list-style-type: none"> <li>• Withinfields - 2 ‘tricky’ cohorts, 14 selected children for the whole year.</li> <li>• Carr Green - Year 1 &amp; 2 children for 6 weeks.</li> <li>• Shelf - From March, a selected group of children from KS2</li> <li>• Cliffe Hill - Groups of children from across the board for confidence, resilience, perseverance and to improve attendance</li> </ul> <p>Additional EP days carried out via cluster funding.</p> <p>Pupils in EYFS benefitting from the effective implementation of the new framework.</p>	<p>What skills do you think you have got better at? Tick all that apply.</p> <p>14 responses</p>  <p>Children are getting EP input sooner which impacts early intervention.</p> <p>A greater proportion of pupils are meeting their targets on ILPs/EHCPs.</p>	<p>Baseline data for SEND was not collected due to complications resulting from COVID. This means there is no quantitative data available.</p>



<p>Pupils across the cluster schools benefit from a consistent approach to Phonics in every school.</p>	<div><div><div>URN/ Estab.</div><div>Setting Name</div></div><div>Eligible</div><div><div>GLD <sup>1 2</sup></div><div>Avg. Total Pts.Score<sup>2</sup></div></div></div> <table><tr><td>-</td><td>NCER National</td><td>616,670</td><td>65.2%</td><td>31.1</td></tr><tr><td>-</td><td>Local Authority</td><td>2,470</td><td>65.4%</td><td>30.8</td></tr><tr><td>-</td><td>School Group</td><td>577</td><td>72.8%</td><td>32.1</td></tr></table> <div><div>Estab. No.</div><div>Estab. Name</div><div><div>WT</div><div>WA</div></div></div> <table><tr><td>-</td><td>NCER National</td><td>21.7%</td><td>75.5%</td></tr><tr><td>-</td><td>Local Authority</td><td>18.3%</td><td>79.3%</td></tr><tr><td>-</td><td>School Group</td><td>17.4%</td><td>82.3%</td></tr></table>	-	NCER National	616,670	65.2%	31.1	-	Local Authority	2,470	65.4%	30.8	-	School Group	577	72.8%	32.1	-	NCER National	21.7%	75.5%	-	Local Authority	18.3%	79.3%	-	School Group	17.4%	82.3%	
-	NCER National	616,670	65.2%	31.1																									
-	Local Authority	2,470	65.4%	30.8																									
-	School Group	577	72.8%	32.1																									
-	NCER National	21.7%	75.5%																										
-	Local Authority	18.3%	79.3%																										
-	School Group	17.4%	82.3%																										
<p>Evidence Portfolios and assignments gathered for L3 FS assessment process.</p> <p>School timetables amended to allow regular FS sessions to take place.</p> <p>The EYFS Framework is being fully implemented in all cluster schools.</p> <p>All ECLC schools have now adopted a validate SPP – although schools are at varying stages of implementation.</p>	<p>Staff are now fully trained and able to competently deliver FS sessions unsupervised.</p> <p>Although staff are not able to train others, they can deliver sessions in other schools and roll out key FS principles and taster sessions.</p> <p>Clear and consistent policies, RAs and planning formats in place.</p> <p>Schools report consistency in use of planning and assessment documentation.</p> <p>Schools are compliant with statutory requirements.</p>																												

<p>10 staff accessed the L3 training and are now fully qualified.</p> <p>Staff have had the opportunity to work alongside EPs in schools.</p> <p>Dyscalculia and Dyslexia Training fully rolled out.</p> <p>SLCN Training fully rolled out and implemented.</p> <p>EYFS staff accessed LA seminars and network training re new Framework – peer moderation has taken place.</p> <p>Schools have implemented individual staff training around Phonics depending on what SPP they have adopted.</p> <p>Head Teachers accessed an Early Reading and Phonics session delivered by a serving OFSTED inspector.</p>	<p>What impact do you feel that forest school has had on your pupils? (Tick all that apply) 8 responses</p>  <table border="1"> <thead> <tr> <th>Impact</th> <th>Count</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>is more self-confident</td> <td>7</td> <td>87.5%</td> </tr> <tr> <td>is more independent</td> <td>8</td> <td>100%</td> </tr> <tr> <td>is better at playing with others</td> <td>6</td> <td>75%</td> </tr> <tr> <td>listens better to adults and chil...</td> <td>6</td> <td>75%</td> </tr> <tr> <td>has learnt and developed usefu...</td> <td>8</td> <td>100%</td> </tr> <tr> <td>has a more positive attitude to...</td> <td>5</td> <td>62.5%</td> </tr> <tr> <td>can concentrate better on parti...</td> <td>3</td> <td>37.5%</td> </tr> <tr> <td>is better at problem solving</td> <td>5</td> <td>62.5%</td> </tr> <tr> <td>is better at assessing risks for t...</td> <td>4</td> <td>50%</td> </tr> <tr> <td>has improved dexterity</td> <td>1</td> <td>12.5%</td> </tr> <tr> <td>has an increased respect for th...</td> <td>6</td> <td>75%</td> </tr> <tr> <td>Option 12</td> <td>0</td> <td>0%</td> </tr> </tbody> </table> <p>Staff express greater confidence in working with pupils with SEND; identifying needs; delivering interventions and preparing for annual reviews.</p> <p>Schools report that staff are more confident in implementing the new framework and making judgements regarding attainment. LA moderation judgements have been favourable for schools within the cluster overall.</p> <p>HTs report that Phonics is being implemented with greater consistency across the majority of schools.</p> <p>Head Teachers expressed a greater awareness of the aspects of Early Reading and Phonics related to the OFSTED schedule.</p>	Impact	Count	Percentage	is more self-confident	7	87.5%	is more independent	8	100%	is better at playing with others	6	75%	listens better to adults and chil...	6	75%	has learnt and developed usefu...	8	100%	has a more positive attitude to...	5	62.5%	can concentrate better on parti...	3	37.5%	is better at problem solving	5	62.5%	is better at assessing risks for t...	4	50%	has improved dexterity	1	12.5%	has an increased respect for th...	6	75%	Option 12	0	0%	<p>The initial plan had to be amended to reflect the fact that the Level 3 Training took a whole year to complete. Therefore, the dissemination of practice to the wider cluster is still to take place.</p> <p>L3 training is no longer available and L1 training is proving difficult to source – will continue to research providers to source appropriate training.</p> <p>Peer Review has not taken place due to COVID restrictions in schools. SEND cluster to focus on sourcing appropriate audit to pilot in 22-23.</p> <p>EYS Triads have not taken place due to COVID restrictions in schools. This will be revived as an evaluation tool in 2022-23 Academic Year.</p>
Impact	Count	Percentage																																							
is more self-confident	7	87.5%																																							
is more independent	8	100%																																							
is better at playing with others	6	75%																																							
listens better to adults and chil...	6	75%																																							
has learnt and developed usefu...	8	100%																																							
has a more positive attitude to...	5	62.5%																																							
can concentrate better on parti...	3	37.5%																																							
is better at problem solving	5	62.5%																																							
is better at assessing risks for t...	4	50%																																							
has improved dexterity	1	12.5%																																							
has an increased respect for th...	6	75%																																							
Option 12	0	0%																																							
<p><b>Comment, including effective practice to share</b></p> <p>FS taster sessions being offered across the cluster 22-23.</p> <p>Possible FS sessions on offer through negotiation with individual ECLC schools – using cluster funding to support.</p> <p>SLA with Circle Psychology to continue 22-23.</p>																																									

Additional LINGO bid for continued SLCN development approved 22-23.
<b>Reference to Funding Impact Report</b> Forest Schools Bid
<b>Finance update</b> Cluster c/f 2021-22 allocation 22-23  Copy of financial statement available on request – please contact Helen Smith

## **North Halifax Cluster Summary of impact September 2022**

### **Evaluation**

End of year Impact Report

<b>Cluster Impact Report</b>  <b>P1 to “Sustain the recovery of vulnerable pupils, particularly disadvantaged and SEND learners, building on the core offer from the (LA) Primary Development Plan and (LA) Recovery Plan, to offer a menu of support and targeted interventions.”</b>  <b>P2 to “Sustain the recovery in core subjects, building on the universal work of the English and West Yorkshire Maths Hubs, to ensure that the curriculum (from EY to Y6) addresses gaps in pupils’ learning through a particular focus on SCLN/SALT, considering the findings of UOH research.”</b>  <b>Date: September 2022</b>  <b>Cluster: NHX, Lead HT: Phil Simpson, Cluster Officer: Clare Cheetham</b>		
<b>Outcomes</b>	<b>Impact Changes/developments</b>	<b>Action if not met</b>
Pupils across a number of cluster schools have benefitted from participating in the Kaleidoscope programme which supports regulation of SEMH and behaviour issues.	Fewer children across the cluster have been at risk of Exclusion or been subject to FTE / PEX as a result of accessing these interventions.	

Children are benefitting from accessing the interventions and employ new systems to support their self regulation and behaviour management.

Pupils in EYFS benefitting from the effective implementation of the new framework – GLD scores are lower than National, however, in relation to the very low starting points across NHX, this is to be expected.

Pupils across the cluster schools benefit from a consistent approach to Phonics in every school. In line with National data.

Pupils in EYFS are demonstrating increased confidence with SLC and are achieving well within the Communication element of GLD.

eg feedback from one HT - "Anecdotally, the children who have had regular sessions frequently ask when the next session is and groups are always full. They are not absent on days they have Kaleidoscope for sure! Whole school attendance YTD is 93.2%. It has not decreased due to the pandemic. PA is still an issue for us (21%), but this is due to families who have taken advantage of the pandemic (previous poor attenders) and most of these children are not in the Kaleidoscope groups - yet. FTE are down from 14 days (20-21) to 1 day this year so far."

Children use the colour check in system to alert staff if they need to see pastoral team that day. This links to Kaleidoscope. Staff know who to target with daily intervention. This helps most children and there are fewer incidents of aggression in the playground.

URN/ Estab.	Setting Name	Eligible	GLD <sup>1 2</sup>
-	NCER National	616,670	65.2%
-	Local Authority	2,470	65.4%
-	School Group	772	60.0%

	WT	WA
- NCER National	21.7%	75.5%
- Local Authority	18.3%	79.3%
- School Group	22.7%	75.3%

74.4% across the cluster compared to 79% nationally.

LINGO project to continue into 22-23 to hopefully further impact on pupil attainment. Also to have a wider reach across year groups and develop some peer review in terms of quality assurance and consistency of practice.

<p>The EYFS Framework is being fully implemented in all cluster schools.</p> <p>All ECLC schools have now adopted a validate SPP – although schools are at varying stages of implementation.</p>	<p>Schools report consistency in use of planning and assessment documentation.</p> <p>Schools are compliant with statutory requirements.</p>	
<p>12 staff accessed the Kaleidoscope training and are now fully qualified.</p> <p>LINGO Training fully rolled out and implemented.</p> <p>EYFS staff accessed LA seminars and network training re new Framework – peer moderation has taken place.</p> <p>Schools have implemented individual staff training around Phonics depending on what SPP they have adopted.</p> <p>Head Teachers accessed an Early Reading and Phonics session delivered by a serving OFSTED inspector.</p> <p>11 Head Teachers from the NHX cluster accessed HT Coaching programme during 21-22.</p>	<p>Staff express greater confidence in working with pupils with SEMH; identifying needs; delivering interventions and preparing for annual reviews.</p> <p>There is now a Kaleidoscope Hub operating at Lee Mount providing advice, guidance and support to schools across the cluster.</p> <p>Schools report that staff are more confident in implementing the new framework and making judgements regarding attainment. LA moderation judgements have been favourable for schools within the cluster overall.</p> <p>HTs report that Phonics is being implemented with greater consistency across the majority of schools.</p> <p>Head Teachers expressed a greater awareness of the aspects of Early Reading and Phonics related to the OFSTED schedule.</p> <p>Information is confidential due to the nature of the project. However, HTs report positive feedback and have asked that the programme continue into 22-23.</p>	

**Comment, including effective practice to share**

HT Coaching continuing into 22-23.

Kaleidoscope Hub established at Lee Mount.

Additional LINGO bid for continued SLCN development approved 22-23.

**Reference to Funding Impact Report**

LINGO

HT supervision

UoH report on disadvantage

**Finance update**

**Copy of the North Halifax Cluster finance report available on request – please contact Helen smith**

## Sowerby Bridge Cluster Summary of impact September 2022

### Evaluation

End of year Impact Report

#### Cluster Impact Report

**P1 to “Sustain the recovery of vulnerable pupils, particularly disadvantaged and SEND learners, building on the core offer from the (LA) Primary Development Plan and (LA) Recovery Plan, to offer a menu of support and targeted interventions.”**

**P2 to “Sustain the recovery in core subjects, building on the universal work of the English and West Yorkshire Maths Hubs, to ensure that the curriculum (from EY to Y6) addresses gaps in pupils’ learning and link this recovery effectively to the computing curriculum in all cluster schools.”**

**Date: September 2022**

**Cluster: Sowerby Bridge, Lead HT: Becky Schofield, Cluster Officer: Clare Cheetham**

Outcomes	Impact Changes/developments	Action if not met																
<p>Additional EP days carried out via cluster funding.</p> <p>Pupils in EYFS benefitting from the effective implementation of the new framework – GLD scores are in line with both LA &amp; National data.</p> <p>Pupils across the cluster schools benefit from a consistent approach to Phonics in every school. Above LA &amp; National data.</p>	<p>Children are getting EP input sooner which impacts early intervention.</p> <p>A greater proportion of pupils are meeting their targets on ILPs/EHCPs.</p> <table><tr><th>URN/ Estab.</th><th>Setting Name</th><th>Eligible</th><th>GLD <sup>1 2</sup></th></tr><tr><td>-</td><td>NCER National</td><td>616,670</td><td>65.2%</td></tr><tr><td>-</td><td>Local Authority</td><td>2,470</td><td>65.4%</td></tr><tr><td>-</td><td>School Group</td><td>344</td><td>65.7%</td></tr></table>	URN/ Estab.	Setting Name	Eligible	GLD <sup>1 2</sup>	-	NCER National	616,670	65.2%	-	Local Authority	2,470	65.4%	-	School Group	344	65.7%	<p>Baseline data for SEND was not collected due to complications resulting from COVID. This means there is no quantitative data available.</p>
URN/ Estab.	Setting Name	Eligible	GLD <sup>1 2</sup>															
-	NCER National	616,670	65.2%															
-	Local Authority	2,470	65.4%															
-	School Group	344	65.7%															

	<table><tr><th>Estab. No.</th><th>Estab. Name</th><th>WT</th><th>WA</th></tr><tr><td>-</td><td>NCER National</td><td>21.7%</td><td>75.5%</td></tr><tr><td>-</td><td>Local Authority</td><td>18.3%</td><td>79.3%</td></tr><tr><td>-</td><td>School Group</td><td>17.9%</td><td>81.9%</td></tr></table>	Estab. No.	Estab. Name	WT	WA	-	NCER National	21.7%	75.5%	-	Local Authority	18.3%	79.3%	-	School Group	17.9%	81.9%	LINGO project is a term behind due to COVID. We are expecting an evaluation towards the end of the Autumn Term. Based on anecdotal data, HTs would like LINGO to continue into 22-23 to hopefully further impact on pupil attainment. Also, to have a wider reach across year groups and develop some peer review in terms of quality assurance and consistency of practice.
Estab. No.	Estab. Name	WT	WA															
-	NCER National	21.7%	75.5%															
-	Local Authority	18.3%	79.3%															
-	School Group	17.9%	81.9%															
<p>The EYFS Framework is being fully implemented in all cluster schools.</p> <p>All SB schools have now adopted a validate SPP – although schools are at varying stages of implementation.</p>	<p>Schools report consistency in use of planning and assessment documentation.</p> <p>Schools are compliant with statutory requirements.</p>																	
<p>Staff have accessed a range of training including Precision Teaching; Dyslexia Awareness.</p> <p>EYFS staff accessed LA seminars and network training re new Framework – peer moderation has taken place.</p> <p>Schools have implemented individual staff training around Phonics depending on what SPP they have adopted.</p> <p>Head Teachers accessed an Early Reading and Phonics session delivered by a serving OFSTED inspector.</p>	<p>Staff express greater confidence in working with pupils with SEND; identifying needs; delivering interventions and preparing for annual reviews.</p> <p>Schools report that staff are more confident in implementing the new framework and making judgements regarding attainment. LA moderation judgements have been favourable for schools within the cluster overall.</p> <p>HTs report that Phonics is being implemented with greater consistency across the majority of schools.</p>																	



LINGO Training being rolled out and implemented.	Head Teachers expressed a greater awareness of the aspects of Early Reading and Phonics related to the OFSTED schedule.	LINGO project is a term behind due to COVID. We are expecting an evaluation towards the end of the Autumn Term. Based on anecdotal data, HTs would like LINGO to continue into 22-23 to hopefully further impact on pupil attainment. Also, to have a wider reach across year groups and develop some peer review in terms of quality assurance and consistency of practice.
<b>Comment, including effective practice to share</b> Maths and Computing became less of a priority for schools against the backdrop of ongoing management of COVID related absence and catch up. HTs agreed to drop these areas of support midway through the year. Additional LINGO bid for continued SLCN development approved 22-23. Contract with Circle Psychology to continue for Academic Year 22-23		
<b>Reference to Funding Impact Report</b>		
<b>Finance update</b>  Copy of Sowerby Bridge Cluster finance document available on request – please contact Helen Smith		

## **Elland Cluster Summary of impact September 2022**

### **Evaluation; Impact Report**

**Cluster Lead Headteacher;** Mark Sharp, Cross Lane

The Cluster's priorities are;

- 1) To raise standards (in Writing, to continue to address previous priority) - this priority will embrace: Achievement, particularly Y6; Narrowing the Gap, social and emotional development; pastoral development. (LA Recovery Plan strands 1 & 2)
- 2) To support pupils' personal, social and emotional development at Y6 - Y7 transition, with particular reference to vulnerable pupils. (LA Recovery Plan strands 1 & 2)

## **Impact Measures, July 2022**

### **Standards**

100% schools meet their own SDP outcomes for progress at the end of Key Stage 2 for all pupils and Disadvantaged pupils

100% schools meet their own SDP outcomes for attainment at the end of Y6 for all pupils and Disadvantaged pupils

100% schools meet their own SDP targets for implementation and impact of the curriculum

100% schools inspected by Ofsted in 2021 - 2022 are at least Good or appropriate action is being taken

By July 2022, no school considered by the LA to be highly vulnerable

Note; Setting the measure at 100% demonstrates the ambition and drive Elland's schools have, to secure the best outcomes for all their pupils.

## Transition

100% identified, vulnerable pupils attend the Pastoral Support Surgeries at the start of Y7 or appropriate action is taken

Calderdale Partnership School Improvement Board: Cluster Plan, Interim Progress and Final Impact Report		
<b>Cluster</b> Elland	<b>Academic Year</b> 2021 - 2022	<b>Cluster Officer/Cluster Lead Head Teacher</b> WMFarrell, MSharp

The

majority of Cluster Y7 pupils engage effectively in learning.

<b>PRIORITY 1:</b> To raise standards (in Writing) - this will embrace the common themes of: achievement, particularly Y6; Narrowing the Gap; social and emotional development; pastoral development; curriculum development					<b>LINKS TO LA PLAN and LA RECOVERY PLAN</b> Strands 1 & 2	
<b>ISSUE</b>	<b>KEY STRATEGIES</b>	<b>IMPLEMENTATION: INPUTS</b>	<b>Ref No.</b>	<b>IMPLEMENTATION: OUTPUTS</b>	<b>Ref No.</b>	<b>PUPIL OUTCOMES</b>
When all pupils are back in school, the intention is to focus rigorously on standards across the curriculum, particularly in Writing	The SDP is fully understood and implemented by all members of staff and supported by Governors	<i>The following inputs provide direct work with pupils and staff, and intensive CPD opportunities for staff.</i>	1	Short/Medium term; Feb 2022 100% schools on track to meet their long-term outputs.	1	Short/Medium term; Feb 2022 100% pupils on track to meet their long-term outcomes
Individual schools have identified their areas of need from their own quantitative and qualitative data, self evaluation, analysis of the	Each school's SDP addresses issues of differential 'recovery' needs of pupils and staff	Participation in Cluster Networks - these are; <b>AHT</b> <b>DHT</b> <b>EYFS</b> <b>Pastoral Support/PSHCE</b> (curriculum focus) - including membership of Secondary colleagues and LA mental health Officers	2	Medium/long term; July 2022 *100% schools meet their own SDP outcomes for progress at the end of Key Stage 2 for all pupils and Disadvantaged pupils	2	*Medium/long term; July 2022 100% pupils in each school meet their own progress targets, established by the school
	Ensure Blended Learning policies continue to be 'fit for purpose' should there be further disruption	LA mental health Officers <b>SCIENCE</b> - joint facilitation of the Network, with KS3 Science Lead	3	*100% schools meet their own SDP outcomes for attainment at the end of Y6 for all pupils and Disadvantaged pupils	3	*100% pupils in each school meet their own attainment targets, established by the school
			4			*100% vulnerable pupils in the extended Forest

<p>impact of current Covid 19 restrictions and consideration of national research into the impact on pupils of the current situation.</p> <p>During discussion at the Cluster meeting on 15; vi:2021 the following common themes emerged: Achievement, particularly Y6 and Writing; Narrowing the Gap; Social and emotional development; Pastoral development; Behaviour; Foundation subjects - implementation and assessment</p>	<p>Ensure participation in the Cluster's training/CPD for all subject/phase Leaders to enable each school's SDP targets to be met e.g. leadership development. These training/CPD opportunities are outlined in the 'Implementation: Inputs' section of this plan</p> <p>SLT to be mindful of staff wellbeing and workforce development requirements</p>	<p><b>SEND</b> - including membership of Secondary colleagues  <b>Writing</b>; the lead Network for the Cluster's 'My Voice Matters' programme - involvement of Secondary colleagues  Possible establishment of a Network to address curriculum issues</p> <p>Implementation of programmes 4, 5 &amp; 6 of the 'My Voice Matters' programme to support engagement in learning and raise standards in Writing</p> <p>Continuation of the Cluster's Forest School learning programme for all schools</p> <p>Implementation of an extended Forest School programme to raise standards of achievement in all areas of development, for vulnerable KS2 pupils</p>	<p>5</p> <p>6</p> <p>7</p> <p>7a</p> <p>7b</p> <p>7c</p>	<p>*100% schools meet their own SDP targets for implementation and impact of the curriculum</p> <p>*100% schools inspected by Ofsted in 2021 – 2022 are at least Good or appropriate action is being taken; this could include a Bid to CPSIB</p> <p>*By July 2022, no school considered by the LA to be highly vulnerable</p> <p>*100% schools evaluate the 'My Voice Matters' as highly effective in meeting its intentions (engagement, personal achievement, attainment, legacy developments)</p> <p>Acceptability; 100% schools contribute to the individual school's programme</p> <p>Fidelity; 100% schools implement the programme as planned collaboratively with the Artists</p> <p>Reach; 11 schools – potentially 1350 pupils and 45 staff initially and directly, leading to increased numbers of staff and pupils</p>	<p>4</p>	<p>School learning programme make significant improvements in engagement, and personal and social development</p>
---	--	--	--	---	----------	---

		<p>from 7 schools - funded by CPSIB</p> <p>Access to the Cluster's bespoke support service from Educational Psychology</p> <p>Re-introduction of collaborative/peer reviews</p> <p>Participation in LA activities which address the priority</p>	<p>7d</p> <p>8</p> <p>8a</p> <p>8b</p> <p>8c</p> <p>8d</p> <p>9</p>	<p>Feasibility; 100% schools evidence new Teaching/Learning strategies across the curriculum</p> <p>*100% schools evaluate the Forest School learning programme as highly effective in meeting its intentions (engagement, personal and social development, sustainable practice)</p> <p>Acceptability; 100% schools consider strategies and experiences as highly valuable</p> <p>Fidelity; 100% targeted staff use additional new strategies when working with pupils</p> <p>Reach; 10 schools – potentially 300 pupils, 10 staff and the parents/Carers of the 300 pupils initially and directly, leading to increased numbers of staff and pupils, leading to the whole school community</p> <p>Feasibility; 100% schools evidence new practices</p> <p>*100% vulnerable pupils and the supporting adults engage</p>		
--	--	--	---	--	--	--

			10	in the extended Forest School learning programme  *The extended Forest School programme meets its Impact Measures, as outlined in the bid		
				<b>Projected costs</b>		<i>£24910.25</i>

### INTERIM PROGRESS

Ref No.	IMPLEMENTATION: OUTPUTS <b>COMMENTARY TO SUPORT PROGRESS RAG RATING</b>	Ref No.	PUPIL OUTCOMES <b>COMMENTARY TO SUPPORT PROGRESS RAG RATING</b>
1	<p>The agenda for each Cluster Meeting includes, 'Cluster Development Plan 2021 – 2022', For this item schools feedback on;</p> <p>1) progress towards own SDP outcomes (Baseline, GLD, Y1 Phonics, Y2 Phonics, KS1 Combined, KS2 Combined – All pupils and Disadvantaged pupils)</p> <p>2) the impact of the Cluster's Forest School Learning programmes</p> <p>3) the impact of the Cluster's 'My Voice Matters' programme</p> <p>Last Cluster meeting; 18:i:2022; majority of outputs on track to be achieved</p>	1(2,3)	<p>Last Cluster meeting; 18:i:2022; majority of outcomes on track to be achieved</p>
		4	<p>Even when pupils have experienced difficulties, they have made significant improvement in engagement and personal and social development.</p>
5	<p>The Greetland retained Outstanding in its Ofsted Inspection in December 2021</p> <p>In addition Elland CE achieved 'Good' in SIAMS inspection December 2021. Previously, 2017, the school had been evaluated as 'Outstanding' but the requirements now are more challenging.</p>		
7 – 7d	<p>100% refers to the 6 schools involved in Programme 4, Autumn term 2021; the other 5 schools are currently involved in programme 5, Spring 2022 – this results in 11 schools at the end of Spring term.</p> <p>Eleven schools will be involved in Programme 6, Summer 2022, which has a transition focus.</p> <p>Highly positive feedback, including the following quote from a Y4 teacher, 'After the very first session of Paul's music,</p>		

	<p>this boy flourished and fully interacted throughout. It was a breakthrough that I could use and did so very successfully. His confidence just went through the roof and his behaviour improved significantly. He developed positive relationships with other boys and plays an active part in the football team. I know the project is called 'My Voice Matters' but for this boy, 'My Life Matters'. There were many success stories but this one is my favourite.'</p> <p>The legacy of staff CPD is well met; collaborative celebration of pupils' work is being considered (Covid 19 restrictions applied during Programmes 1-4 and may still, thus rendering any such activity impossible).</p>		
8 – 8d	<p>Highly positive feedback including the following quote from a Y6 pupil, 'I love it here. I feel as free as a bird. When I'm inside I feel like a caged bird I never feel free'.</p> <p>Covid 19 restrictions (including transport) resulted in a modified programme.</p>		
9, 10	<p>Overall, highly positive feedback</p> <p>5 schools involved in the Extended Forest School. Three vulnerable students from Brooksbank are also involved and making significant progress.</p> <p>Harsh weather and inappropriate clothing (despite advice and the offer of clothing) caused difficulties for some pupils – this is being addressed.</p> <p>Comment from a KS 2 Leader, 'Confidence in himself to do work has improved. Confidence during extended writes has improved.'</p> <p>Even when pupils have experienced difficulties, they have made significant improvement in engagement and personal and social development.</p> <p>The parents'/Carers' Forest School Learning Saturday session had to be cancelled due to the storm in December. It</p>		



	is hoped that this can be rearranged, although identifying a suitable date is proving problematic.		
--	--	--	--

**Costs against plan and other expenditure**

<b>Projected Costs</b>	<b>Actual Costs to date</b>	<b>Projected over/underspend by September</b>	<b>Balance</b>	
			Brought forward: 1 September	£16,875.15
£24,190.25	£25,477.87	£2,000 <i>Plan in place to address projected overspend</i>		
			Carried forward: 28 February	£1,287.62

**SUMMARY OF IMPACT TO DATE**

<p align="center"><b>Commentary</b></p> <p>Feedback re. attainment and progress is positive and schools are engaging with the strategies in place: Networks, 'My Voice Matters', Forest School learning, EP service. Despite the advances made, Writing, and the achievement of Disadvantaged pupils continue to be a concern.</p>		<p align="center"><b>Numerical links to the priorities identified in the Primary Development Programme or CASH Action Plan</b></p> <p>LA Recovery Plan; Strands 1 &amp; 2</p>
--	--	---

**FINAL IMPACT**

<i>Ref No.</i>	<b>IMPLEMENTATION: OUTPUTS COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING</b>	<i>Ref No.</i>	<b>PUPIL OUTCOMES COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING</b>
4	Schools are addressing assessment of the curriculum	2	The predictions throughout the year did not come to fruition in all schools. Strategies are in place to address the lack of progress by some pupils This becomes a priority for 2022 -23.
5	Ofsted Inspection Report for West Vale – pending	3	See 2
6	Yet to be finalised by the LA		
7	The vast majority (91%) of schools strongly agree		

7c	10 schools were involved in the Summer term programme. All 11 schools will be involved in 2022 – 2023		
7d	See 7c		

#### Costs

<i>Projected Costs</i>	<i>Actual Final Costs</i>	<i>How was over/underspend deployed/funded?</i>	<i>Balance</i>	
			<i>Brought forward: 1 March</i>	
			<i>+ new allocation</i>	
			<i>Carried forward: 31 August</i>	

#### SUMMARY OF FINAL IMPACT

<b>Commentary</b>	<b>Numerical links to the priorities identified in the Primary Development Programme or CASH Action Plan</b>
The majority of schools met many of their own SDP targets; two schools met all their targets. However, whilst some schools did not meet their targets for attainment and progress, more than half (66%) achieved outcomes which are in line with or higher than the national average. The Cluster has been invited to showcase its 'My Voice Matters' programme and the extended Forest School programmes at the national Music conference in Newcastle in November 2022.	LA Recovery Plan; Strands 1 & 2

<b>PRIORITY 2:</b> To support pupils' personal, social and emotional development at Y6 - Y7 transition, with particular reference to vulnerable pupils.					<b>LINKS TO LA PLAN and LA RECOVERY PLAN</b> Strands 1 & 2	
<i>ISSUE</i>	<i>KEY STRATEGIES</i>	<i>IMPLEMENTATION: INPUTS</i>	<i>Ref No.</i>	<i>IMPLEMENTATION: OUTPUTS</i>	<i>Ref No.</i>	<i>PUPIL OUTCOMES</i>

<p>Pupils display a wide range of additional needs, Pre Covid 19 self-evaluation indicated that approximately 20% pupils failed to make their targeted progress as a result of additional needs and approximately 20% pupils come from families with a range of social and emotional needs. These pupils display a range of behaviours which inhibit their learning including a paucity of social &amp; emotional skills. <i>The scheduled discussions with senior staff at Brooksbank, to promote effective transition for pupils from Y6 – Y7, indicate that that</i></p>	<p>In addition to Priority 1 strategies, schools are placing increasing emphasis on pastoral support staff to meet the needs of pupils which inhibit achievement.</p> <p>Participation of pastoral Leaders in the Cluster Network re. Pastoral support.</p>	<p>Participation by Pastoral Leaders in the Cluster Pastoral Support/PSHCE Network which has two complementary and mutually supportive strands; 1) curriculum focus 2) pastoral focus Secondary colleagues, LA mental health Officers. and the Mental Health Support Team Lead are members of this Network.</p> <p>*Review, evaluation and development of the wide range of strategies to promote continuity of development and learning from KS2 to KS3</p> <p>*Reintroduction of the face-to-face 'Pastoral Support Surgeries' programme at the end of KS2 and the start of KS3</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>4a</p> <p>4b</p> <p>4c</p>	<p>Short/Medium term; Feb 2022 100% schools participate in the Transition programme</p> <p>100% schools participate in the Pastoral Support Surgeries programme, July - October 2021</p> <p>100% schools on track to meet the long-term outputs.</p> <p>Medium/long term; July 2022 Reviewed, evaluated and amended Transition programme in place for Spring, Summer, Autumn 2022, including the Pastoral Support Surgeries programme for July - October 2022, and implemented by 100% schools</p> <p>Acceptability; 100% schools contribute to the review, evaluation and amendment of strategies (real and/or virtual) 100% schools implement the agreed strategies</p> <p>Fidelity; 100% schools implement the agreed strategies as intended</p> <p>Reach; 420 Y6 pupils immediately and</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>Short/Medium term; Feb 2022 100% identified pupils participate in the Surgeries; if not, appropriate action is taken by Primary and Secondary colleagues</p> <p>100% participating pupils consider the Surgeries to be helpful</p> <p>100% participating pupils are reported to have settled into Secondary school and are learning effectively</p> <p>Medium/long term; July 2022 100% participating pupils have made at least appropriate progress in personal/social and academic development</p>
---	---	---	---	---	---

<p><i>the situation in Cluster Primary schools is replicated in Secondary school, although, as a result of the Transition work, there is strong evidence that pupils are settling into Secondary school better than previously and the quality of their learning is improving.</i></p> <p><b>The Cluster's Pastoral Support Surgeries did not take place in 2020 as a result of Covid 19 restrictions.</b></p> <p>National research indicates that, as a result of the global Covid 19 Pandemic, the situation will be considerably</p>			<p>4d</p>	<p>420 Y5 prospectively, 70 vulnerable Y6 - Y7 pupils</p> <p>Feasibility; 100% strategies will be feasible, if Covid 19 restrictions are removed. If restrictions still apply virtual activities will be implemented which will reduce the face-to-face opportunities i.e. the feasibility of the programme will be reduced</p> <p>Note; 10/11 schools are involved with the Y6 - Y7 transition work with Brooksbank and Park Lane. Pupils from St Mary's attend All Saints, in Kirklees LA.</p>		
---	--	--	-----------	--	--	--

worse than the pre Covid 19 position						
				<b>Projected costs</b>		

### **INTERIM PROGRESS**

<i>Ref No.</i>	<i>IMPLEMENTATION: OUTPUTS</i> <b>COMMENTARY TO SUPPORT PROGRESS RAG RATING</b>	<i>Ref No.</i>	<i>PUPIL OUTCOMES</i> <b>COMMENTARY TO SUPPORT PROGRESS RAG RATING</b>
1,2,3	<p>The agenda for each Cluster Meeting includes, 'Cluster Development Plan 2021 - 2022', For this item schools feedback on the impact of the Transition arrangements. In addition, the Pastoral Support/PSHCE Network, which initiated a range of Transition strategies, including Pastoral Support Surgeries reviews the quality of implementation and its impact.</p> <p>Last Cluster meeting, 18:i:2022; all outputs on track to be achieved.</p> <p>Last Network (Pastoral Support/PSHCE) meeting, 8:xii:2021; all outputs on track to be achieved.</p>	1,2,3	<p>Last Cluster meeting, 18:i:2022; all outcomes on track to be achieved.</p> <p>Last Network (Pastoral Support/PSHCE) meeting, 8:xii:2021; majority of outcomes on track to be achieved.</p>
2	<p>Concerns were expressed re. the arrangements for the Y7 Pastoral Support Surgeries at Brooksbank. Effective communication with the Head of Transition resulted in immediate improvements to the programme.</p>	1,2	See comments in Output 2

	<p>Feedback from parents/Carers continues to be positive. Autumn feedback from participating staff, pupils/students, parents/Carers informs the planned arrangements for each subsequent year.</p> <p>The Transition arrangements are reviewed at monthly meetings with the Cluster Lead Headteacher, Cluster Officer, DHT Brooksbank and Head of Transition Brooksbank and at the annual review meeting involving all Cluster HTs. Amendments are made as a result of these meetings.</p> <p>The Pastoral Support/PSHCE Network reviews and amends the protocol for the Pastoral Support Surgeries.</p>		
		3	<p>Oral feedback from the Head of Transition at Brooksbank indicates that the identified students have settled in well.</p> <p>Written feedback from Form Tutors is being prepared.</p>

#### Costs against plan and other expenditure

<b>Projected Costs</b>	<b>Actual Costs to date</b>	<b>Projected over/underspend by September</b>	<b>Balance</b>	
			<i>Brought forward: 1 September</i>	£10,877.85
£14,816.75	£13,718.85	NIL		
			<i>Carried forward: 28 February</i>	£1,097.90

#### SUMMARY OF IMPACT TO DATE

<b>Commentary</b>	<b>Numerical links to the priorities identified in the Primary Development Programme or CASH Action Plan</b>
<p>A bid to support Transition work with Brooksbank was submitted to The Partnership Board in March 2016. The bid was successful and served to 'pump prime' development work to improve</p>	

<b>Cluster</b> <b>SPECIALIST PROVISION</b>	<b>Academic</b> <b>Year</b> <b>2021/22</b>	<b>Cluster Officer/Cluster Lead Head Teacher</b> <b>David Kirk and Sue Ackroyd</b>
<p>the Transition processes. Subsequently, sustained and innovative developments have been trialled and, where appropriate, embedded in the Transition Programme, to the benefit of pupils/students, staff and parents/Carers.</p> <p>This priority is kept under review by: Headteachers at Cluster meetings; monthly meetings of the Lead HT, Cluster Officer, Head of Transition [BBS] and DHT [BBS]; members of the Pastoral Support/PSHCE Network.</p>		LA Recovery Plan; Strands 1& 2

### **FINAL IMPACT**

<i>Ref No.</i>	<i>IMPLEMENTATION: OUTPUTS</i> <b>COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING</b>	<i>Ref No.</i>	<i>PUPIL OUTCOMES</i> <b>COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING</b>
4	The Transition programme was reviewed and, as a result of the challenging conditions at BBS, was significantly reduced. Close contact with key staff at BBS was maintained throughout the period and the protocol for the implementation of the Pastoral Support Surgeries was re-established (following the Covid pandemic) and implemented. The surgeries will begin in September and the impact evaluated by BBS and the Pastoral Support Network.	4	Protocols in place; impact will be evaluated by BBS, and at the Pastoral Support Network sessions in the Autumn term.

### **Specialist Provision Cluster Summary of impact September 2022**

<b><u>PRIORITY 1: Sustain the recovery and progress of all students on all learning pathways</u></b>					<b>LINKS TO LA PLAN and LA RECOVERY PLAN</b>	
<i>ISSUE</i>	<i>KEY STRATEGIES</i>	<i>IMPLEMENTATION: INPUTS</i>	<i>Ref No.</i>	<i>IMPLEMENTATION: OUTPUTS</i>	<i>Ref No.</i>	<i>PUPIL OUTCOMES</i>



The overwhelming majority of pupils have multiple, complex needs	Sustain cluster Safeguarding Network to tackle bespoke SPC issues  Commission current needs across special schools to ensure that provision is not simply based on current numbers, available space nor levels of staffing  Investigate S.I.O.T to develop a training programme; support for assessment; regular supervision to coaching to problem-solve	<b>Training</b> <ul style="list-style-type: none"><li>Half termly networks</li><li>Bespoke DSL input from Steve Barnes</li><li>Presentation of audit report (Gary Laird)</li><li>Submission to (LA) SEND review workstreams</li><li>S.I.O.T programme</li><li>Related <i>Engage</i> events</li></ul> <b>Mentoring and Coaching</b> <ul style="list-style-type: none"><li>Case studies (networking) support</li><li>Dissemination of audit report by heads to GBs</li><li>Regular S.I.O.T. supervision sessions</li></ul> <b>Resources</b> <ul style="list-style-type: none"><li>DSL presentations</li><li>Audit report</li><li>S.I.O.T. toolkits/resources</li><li>Related <i>Engage</i> toolkits</li></ul> <b>Monitoring</b>	1	<b>Short Term (Dec 2021)</b> <u>Acceptability</u> <ul style="list-style-type: none"><li>Good attendance at SGNs</li><li>Leaders, governors and LA officers accept the audit findings</li><li>Leaders can assess the early impact of S.I.O.T</li></ul> <u>Fidelity</u> <ul style="list-style-type: none"><li>Vast majority of staff agree that SGN meetings are streamlined</li><li>Admission criteria adheres to audit findings</li><li>Early impact of S.I.O.T. used to determine training modules</li></ul> <u>Feasibility</u> <ul style="list-style-type: none"><li>Procedures in place with ease</li><li>Audit recommendations can be implemented with relative ease</li><li>All DSLs say frequency and length of SGNs are manageable</li></ul> <u>Reach</u> <ul style="list-style-type: none"><li>All vulnerable students (network)</li><li>All students and staff (audit)</li><li>Majority of eligible students (SIOT)</li></ul>	13	<b>Short Term (Dec 2021)</b> <ul style="list-style-type: none"><li>Attendance of vast majority of students is 90%+</li><li>Vast majority of families say students have been supported with their physical and mental health</li><li>Vast majority say they feel safe at school</li><li>Progress of identified students benefits from S.I.O.T. (from Sept baseline)</li><li>Highly vulnerable students continue to make good progress</li><li>Students with ECTs make progress similar to those taught by experienced teachers</li></ul>	
			2		14		
			3		15		
			4		16		
			5		17		
			6		18		
			7		<b>Medium Term (April 2022)</b> <u>Acceptability</u> <ul style="list-style-type: none"><li>Sustained attendance at SGNs</li><li>S.I.O.T. becoming embedded</li><li>Audit actions plans in place</li></ul> <u>Fidelity</u> <ul style="list-style-type: none"><li>Almost all staff agree that SGN meetings inform practice</li><li>Implementation underway (audit)</li></ul>		
			8				
			9				
			10				
			11				
			12				
		1	13	<b>Medium Term (April 2022)</b> <ul style="list-style-type: none"><li>Attendance of vast majority of students is 95%+</li><li>Vast majority of families say support for students with their physical and mental health has been sustained</li><li>The proportion subject to CIN/CIPs has reduced</li></ul>			
		2	14				
		3	15				
		4	16				
		5					
		6					
		7					

		<ul style="list-style-type: none"><li>Minutes from Chair of network</li><li>GB minutes – implications from audit (Gary Laird)</li><li>SEND review (LA)</li><li>Cluster minutes (LA partnership working)</li><li>Focused (S.I.O.T.) observations and/or learning walks</li><li>Data (progress) tracking</li><li>Staff surveys/feedback</li><li>Student feedback</li></ul>	8 9 10 11 12  1 2 3  4 5 6 7 8 9 10 11 12 13 14	<ul style="list-style-type: none"><li>S.I.O.T. implemented as intended</li></ul> <u>Feasibility</u> <ul style="list-style-type: none"><li>High quality SGN feedback from almost all DSLs</li><li>Action plans are manageable</li><li>Staff say that S.I.O.T. procedures are manageable</li></ul> <u>Reach</u> <ul style="list-style-type: none"><li>All vulnerable students (network)</li><li>All students and staff (audit)</li><li>Vast majority of eligible students (SIOT)</li></ul> <b>Long Term (July 2022)</b> <u>Acceptability</u> <ul style="list-style-type: none"><li>Succession plan for 2022/23 in place led by existing DSL</li><li>Audit forms part of LA SEND plan</li><li>S.I.O.T. fully embedded across all cluster schools</li><li>ITT plan accredited</li></ul> <u>Fidelity</u> <ul style="list-style-type: none"><li>Almost all staff say that practices are shaped from input and case studies</li><li>LA admission requests adhere to LA SEND plan</li><li>S.I.O.T. implementation embedded in curriculum plans</li></ul> <u>Feasibility</u> <ul style="list-style-type: none"><li>Almost all DSLs say that new or revised practices are manageable</li><li>School records clearly demonstrate impact of LA action related to audit</li></ul>	17 18  15 16  17 18 19	<ul style="list-style-type: none"><li>Progress of identified students (S.I.O.T.) sustained. (from Sept baseline)</li><li>Highly vulnerable students continue to make good progress</li><li>Rates of progress for students with ECTs are in line with students on similar pathways with experienced teachers</li></ul> <b>Long Term (July 2022)</b> <ul style="list-style-type: none"><li>Attendance of vast majority of pupils remains at 95%+</li><li>Almost all students have made sustainable gains in their learning against their personalised pathways</li><li>Outcomes for students engaged in S.I.O.T. have been sustained and impact is proven</li><li>Highly vulnerable students made good progress and the proportion subject to <u>existing</u> CIN/CIPs has reduced</li><li>Almost all pupils taught by ECTs have made the best progress of which they are capable</li></ul>
New teachers need improved knowledge of specialist learning pathways and how to meet the needs of students with a range of complex needs	Evaluate the bespoke pilot ITT apprenticeship route  Further develop the ITT apprenticeship programme to attain DfE accreditation; to attract a greater number of host schools; and to secure sustainability <ul style="list-style-type: none"><li>DfE ITT updates and new routes</li><li>Teaching Hub</li></ul>	<b>Training</b> <ul style="list-style-type: none"><li>20% professional studies</li><li>80% supervised class teaching</li><li>Alternative short placement</li></ul> <b>Mentoring and Coaching</b> <ul style="list-style-type: none"><li>Weekly supervision with ITT mentor</li></ul> <b>Resources</b> <ul style="list-style-type: none"><li>SPC modules</li></ul> <b>Monitoring</b> <ul style="list-style-type: none"><li>Trainee observations</li></ul>				

		<ul style="list-style-type: none"> <li>Module assessments</li> <li>Reports to trainees</li> <li>Trainee feedback</li> <li>SLT feedback on early knowledge/skills of new teachers</li> <li>Learning walks</li> <li>UOH/DfE feedback</li> </ul>		<ul style="list-style-type: none"> <li>Staff say that S.I.O.T. procedures have no adverse impact on workload</li> <li>New teachers' skills are relevant</li> </ul> <p><u>Reach</u></p> <ul style="list-style-type: none"> <li>All vulnerable students (network)</li> <li>All students and staff (audit)</li> <li>Almost all eligible students (SIOT)</li> </ul> <p><b>Costs</b></p> <p>Safeguarding network = <b>£942</b>  Health and Safety Audits = <b>£2500</b>  S.I.O.T = <b>£3000</b>  ITT = <b>£3650</b></p>		
<b>PRIORITY 2: Check the impact of the curriculum to make certain that it is sufficiently well planned and sequenced, and ambitious so that students make sustained progress from their starting points</b>						<b>LINKS TO LA PLAN and LA RECOVERY PLAN</b>
ISSUE	KEY STRATEGIES	IMPLEMENTATION: INPUTS	Ref No.	IMPLEMENTATION: OUTPUTS	Ref No.	PUPIL OUTCOMES
Curriculum development has been impeded by the impact of the pandemic	Sustain the focus on effective leadership on core subjects by intelligent adaptation of evidence-based approaches to specialist settings: <ul style="list-style-type: none"> <li>NASEN</li> <li>DfE guidance updates</li> <li>EEF subject reports</li> </ul>	<b>Training</b> <ul style="list-style-type: none"> <li>Developing a subject manager toolkit</li> <li>Modelling from maths and reading leaders</li> <li>Application to learning pathways</li> <li>(LA) EY framework</li> <li>Early adopter audits of EY impact &amp; reports from pilot</li> </ul>	19 20 21 22 23	<b>Short Term (Dec 2021)</b> <u>Acceptability</u> <ul style="list-style-type: none"> <li>Curriculum leaders accept need for bespoke SPC approaches and relevant EY framework</li> <li>Curriculum leaders will implement changes related to EY framework</li> <li>SBMs agree that the network is impactful</li> </ul> <u>Fidelity</u> <ul style="list-style-type: none"> <li>Majority of curriculum leaders agree that SPC approaches are impactful on learning pathways</li> </ul>	30 31 32 33	<b>Short Term (Dec 2021)</b> <ul style="list-style-type: none"> <li>All students are accessing the full range of pathways</li> <li>Improved reading and maths outcomes (from July 2021 baseline) for majority of students</li> <li>A greater proportion of students have improved communication/speaking skills and, where appropriate, greater phonological awareness</li> <li>Pupils' writing (where appropriate) demonstrates</li> </ul>

School Business Managers are working in isolation which may not effectively support curriculum planning and implementation	<ul style="list-style-type: none"> <li>Emerging <i>Ofsted</i> evidence</li> <li><i>Engage and Connect</i></li> </ul> <p>Extend the focus to:</p> <ul style="list-style-type: none"> <li>Communication</li> <li>RSE</li> <li>Foundation subjects</li> </ul>	<p><b>Mentoring/Coaching</b></p> <ul style="list-style-type: none"> <li>Peer deep dives and action planning</li> <li>Paired working on RSE schemes and provision</li> <li>ECT support</li> </ul> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li>Subject manager toolkit</li> <li>SPC 'deep dive' pro-formas</li> <li>Digital recording platforms</li> <li>NASEN skills audits</li> </ul> <p><b>Monitoring</b></p> <ul style="list-style-type: none"> <li>Appraisal</li> <li>Subject leader files</li> <li>Subject learning walks</li> <li>Tracking data</li> <li>Student progress meetings</li> <li>Staff surveys</li> </ul> <p><b>Training</b></p> <ul style="list-style-type: none"> <li>Half termly network meetings linked to (ECLC) SBM network</li> <li>Sharing practices and procedures</li> <li>Focused seminars on specific aspects arising from network meetings</li> </ul>	<p>24</p> <p>25</p> <p>26</p> <p>27</p> <p>28</p> <p>29</p> <p>19</p> <p>20</p> <p>21</p> <p>22</p> <p>23</p> <p>24</p> <p>25</p> <p>26</p> <p>27</p>	<ul style="list-style-type: none"> <li>Sustained evidence of mastery across curriculum planning</li> <li>SBMs implement changes</li> </ul> <p><i>Feasibility</i></p> <ul style="list-style-type: none"> <li>Majority of teachers say that procedures can be put in place with ease and are manageable</li> <li>Curriculum leaders say that new and/or revised systems are becoming easy to manage</li> <li>SBMs say that changes are manageable</li> </ul> <p><i>Reach</i></p> <ul style="list-style-type: none"> <li>All curriculum leaders benefit from work groups</li> <li>All SBMs benefit from network</li> </ul> <p><b>Medium Term (April 2022)</b></p> <p><i>Acceptability</i></p> <ul style="list-style-type: none"> <li>Majority of foundation subject leaders accept need for systemic changes bespoke to SPC</li> <li>Long term subject plans address relevant aspects of EY framework</li> <li>Impact of SMB network is sustained</li> </ul> <p><i>Fidelity</i></p> <ul style="list-style-type: none"> <li>Procedures are adhered to by all stakeholders</li> <li>Vast majority of curriculum leaders agree that SPC approaches are impactful on learning pathways</li> <li>Systems becoming evident in a range of foundation subjects</li> <li>New SBM practices are embedded</li> </ul> <p><i>Feasibility</i></p>	<p>34</p> <p>30</p> <p>31</p> <p>32</p> <p>33</p> <p>34</p> <p>35</p>	<p>spelling linked directly to their phonic knowledge</p> <ul style="list-style-type: none"> <li>A greater proportion of students are able to demonstrate mastery in maths</li> </ul> <p><b>Medium Term (April 2022)</b></p> <ul style="list-style-type: none"> <li>Almost all students are making sustainable gains in their learning against their personalised pathways</li> <li>Improved reading and maths outcomes (from January 2022 baseline) for majority of students</li> <li>More pupils improving communication/speaking</li> <li>More pupils improving their phonological awareness</li> <li>More pupils can recall phonics knowledge from their long term memories</li> <li>Greater proportion of pupils (all abilities) demonstrate mastery maths and, where appropriate, can apply fluently to unfamiliar situations</li> </ul>
--	--	---	---	--	---	--

	<ul style="list-style-type: none"> <li>• Policies and procedures</li> </ul> <p>Ensure financial support from the cluster annual allocation supports all aspects of SPC work</p>	<ul style="list-style-type: none"> <li>• Bid writing</li> </ul> <p><b>Mentoring/Coaching</b></p> <ul style="list-style-type: none"> <li>• Peer working on specific aspects to jointly develop relative areas of expertise</li> </ul> <p><b>Resources</b></p> <ul style="list-style-type: none"> <li>• SLAs – LA</li> </ul> <p><b>Monitoring</b></p> <ul style="list-style-type: none"> <li>• SBM surveys</li> <li>• ISBs</li> <li>• Admin staff surveys</li> <li>• GB minutes</li> </ul>	28 29 20 21 22 23 24 25 26 27	<ul style="list-style-type: none"> <li>• Curriculum leaders say that new and/or revised systems are now embedded due to manageability</li> <li>• SBM changes are sustained over time due to ease/impact</li> </ul> <p><u>Reach</u></p> <ul style="list-style-type: none"> <li>• All members of curriculum teams benefit from work groups</li> <li>• Attendance sustained: SBM network</li> </ul> <p><b>Long Term (July 2022)</b></p> <p><u>Acceptability</u></p> <ul style="list-style-type: none"> <li>• Long term subject plans incorporate all changes</li> <li>• Succession plan in place for SBM network</li> </ul> <p><u>Fidelity</u></p> <ul style="list-style-type: none"> <li>• Almost all curriculum leaders agree that SPC approaches are remain impactful on student outcomes</li> <li>• Systems are embedded in a range of foundation subjects</li> <li>• Range of (SBM) policies and procedures common across SPC</li> </ul> <p><u>Feasibility</u></p> <ul style="list-style-type: none"> <li>• Curriculum leaders say that new and/or revised systems are now embedded due to manageability</li> <li>• SBMs say that revised policies and procedures are easy to manage</li> </ul> <p><u>Reach</u></p> <ul style="list-style-type: none"> <li>• All teachers &amp; administration staff</li> </ul> <p><b>Costs</b></p> <p>TRG (maths) = <b>£1000</b> Reading leadership = <b>£5000</b></p>	28  29  30 31 32	<p><b>Long Term (July 2022)</b></p> <ul style="list-style-type: none"> <li>• Almost all students have made sustainable gains in their learning against their personalised pathways in core subjects</li> <li>• Improved outcomes for the majority of students within each subject area identified within each of the learning pathways</li> <li>• More pupils improving communication/speaking</li> <li>• More pupils improving their phonological awareness</li> <li>• More pupils can demonstrate greater mathematical fluency</li> </ul>
--	---	--	--	---	------------------------------------	---

				Communication leadership = <b>£2000</b> RSE peer work (release) = <b>£2000</b> Administration time = <b>£2260</b>		
--	--	--	--	---	--	--

### INTERIM PROGRESS

Ref No.	IMPLEMENTATION: OUTPUTS COMMENTARY TO SUPPORT PROGRESS RAG RATING	Ref No.	PUPIL OUTCOMES COMMENTARY TO SUPPORT PROGRESS RAG RATING
2	Audit completed and report received – did not meet expectations of original commission and thus limited in consequent progress. Need to discuss further with LA.	13	COVID has continued to impact. Need confirmed figures for this term.
3 & 6	Awaiting update from LA regarding SIOT. Aware that WHSS staff were due to be commissioned, however no further update received.	14, 15, 17 & 18	Need to be actioned as not completed by Dec 2021.
23	Reading - group has met and good practice is being shared. Too early to confirm sustained evidence of mastery.	16	Awaiting update from LA regarding SIOT, so no progress possible.
24, 27 & 29	SBM group established and well attended. Need to do more focused follow up in terms of assessing impact.	30-34	Need Reading and Maths groups to evidence impact – planned as focus for next meeting.
23 & 28	RSE leads confirmed and meetings planned for Spring/Summer Term to focus on this area of curriculum. Continued meetings for Reading and Maths have been coordinated to assess impact.		

### Costs against plan and other expenditure

Projected Costs	Actual Costs to date	Projected over/underspend by September	Balance
			Brought forward: 1 September

£ 51,125.00	£ 32,531.67			
			Carried forward: 28 February	£ 42,578.70

### SUMMARY OF IMPACT TO DATE

<b>Commentary</b>	<b>Numerical links to the priorities identified in the Primary Development Programme or CASH Action Plan</b>
<p>ITT Programme is being well received and audit for the course is planned to assess full impact. Curriculum Development has progressed, with Maths being self-led, Reading establishing key strands for each school following deep-dives, and RSE commencing using similar model in the Spring/Summer Term.</p> <p>Audit was completed by Gary Laird; however it did not fulfil expectations of original commission, and it has been determined that further work on this audit will not yield the information required. Thus, progress against this is likely to be slowed. Need to discuss further with LA, especially in light of new SEN Manager. This remains an area of concern in terms of admissions.</p> <p>SIOT is only area of concern as awaiting update from LA regarding the plan for this programme. Thus progress has not taken place against these actions.</p>	

### FINAL IMPACT

Ref No.	IMPLEMENTATION: OUTPUTS COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING	Ref No.	PUPIL OUTCOMES COMMENTARY TO SUPPORT FINAL IMPACT RAG RATING
2	Capacity in the Special Schools remains an issue. H&S Audit did not meet needs so work continues.	13	Attendance remains a focus and is included in each school's individual plans.
3, 6 & 16	SPC Cluster commissioned initial consultation with SIOT specialist to establish baseline of need. Tier 3 support remains unmet need for many children as named in the EHCP. Need to pursue with LA/Partnership Board.	14, 15, 17 & 18	Specific targets for each school have been shared to identify any themes or shared areas of concern.

23	Reading - group continues to meet and good practice is being shared. Too early to confirm sustained evidence of mastery. Will be focus of 2022/23.	16	
24, 27 & 29	SBM group established and well attended. Impact is agreed as positive.	30-34	Need Reading and Maths groups and new PSHE group to evidence impact – planned as focus for 2022/23.
23 & 28	RSE leads had initial meeting to share current status and practice. Focus on this area of curriculum will be in 2022/23. Maths group is now self-sustaining, led by the Maths Hub.		

### Costs

Projected Costs	Actual Final Costs	How was over/underspend deployed/funded?	Balance	
			Brought forward: 1 March	32, 585.68
			+ new allocation	24,570
£ 51,125.00	£22,388.00	This reflects the income made by the SPC Offer to schools. Currently the Special Schools have not been financially supported by cluster funding where staff are out providing Support, so this is planned for the future as this would impact considerably on the final balance.		
			Carried forward: 31 August	36.792.68

### SUMMARY OF FINAL IMPACT

Commentary	Numerical links to the priorities identified in the Primary Development Programme or CASH Action Plan
ITT Programme has been well received and successful and a full Evaluation Report has been completed. All the PGCE apprentices successfully completed the programme. The SPC Cluster	



<p>now needs to focus on the sustainability and expansion of the programme for the future, continuing to work with the University of Huddersfield.</p> <p>Curriculum Development has progressed, with Maths being self-led, Reading establishing key strands for each school following deep-dives, and RSE/PSHE commencing using a similar audit which has been developed in the Summer Term.</p> <p>Capacity and admissions remain areas of concern.</p> <p>SIOT likewise remains a concern, as increasing numbers of children having SIOT named on their EHCP, with a lack of provision then available to meet need. A consultation commissioned by the SPC identified agreed practice and assessment across the schools, so clarity of need could be established. Next steps are to determine how to respond to this need.</p>	
---	--

### **Todmorden Cluster Summary of impact September 2022**

#### **Evaluation**

End of year Impact Report – Todmorden Cluster

The 3 key priorities for the Todmorden Cluster 2021/22 were:

1. ***Year 1 of the LINGO project – early language acquisition.*** Further information about this project and the impact are detailed below.
2. ***Inclusion – behaviour and wellbeing.*** We were successful in our bid to the Partnership board (£15K) for funding for a Family Support worker to work with hard-to-reach families initially in 2 schools in the Todmorden cluster. The successful candidate commenced in post in the Autumn term 2022 and early reports from the 2 Headteachers (Walsden and Cornholme) have been very positive and shared with the Todmorden cluster headteachers.
3. ***Cluster Headteachers to work in triads) to support school improvement*** (following a similar model to Calderdale Secondary School Improvement Cluster). This priority was put on hold and has now been included in our 2022/23 cluster action plan.

<b>Cluster Impact Report, Date 8.11.2022</b> <b>Cluster: Todmorden, Lead HT: Emma Crowther, Cluster Officer - Jackie Nellis</b>		
<b>Outcomes</b>	<b>Impact Changes/developments</b>	<b>Action if not met</b>
LINGO programme 2021/22 Pupil outcomes	<b>Speech and language therapy referrals</b>	

	<p><b>A total of 81 children</b> in Todmorden Cluster schools were referred to LINGO over the academic year. All of these children were assessed and supported by a speech and language therapist.</p> <p>By the end of the year, 31 children were discharged. The majority of discharges were due to children no longer needing speech and language support. A small minority were due to children moving schools, needing referrals onto other services (CAHMS) or local speech and language therapy services were now able to support.</p> <p>Of the remaining children, the majority (just over 90%) have achieved targets set and have made good progress with their speech, language and communication. They continue to need further support and continue to be part of the speech and language therapist's caseload. There is a wide range of needs, including children with a range of Language Disorders and complex Communication needs. Staff report they are much more confident to support these children both in the classroom and more generally. Both direct and indirect therapy will continue with these children as appropriate. The therapist is also supporting the process for EHCP applications where appropriate and / or onward referral.</p> <table><tr><th>School</th><th>Support</th></tr><tr><td>Cornholme</td><td>30 children referred, assessed and supported</td></tr></table>	School	Support	Cornholme	30 children referred, assessed and supported	
School	Support					
Cornholme	30 children referred, assessed and supported					

		10 children discharged Small group interventions focusing on phonological awareness skills (Sounds Right)	
	Ferney Lea	11 children referred, assessed and supported 3 children discharged Small groups in Y5 and Y6 focusing on language (Language Legends) Whole class Language Legends started in Y3 and Y4	
	Parkinson Lane	8 children referred, assessed and supported 3 discharged Small group language (Chatterboxes) and phonological awareness (Sounds Right) interventions running with children in reception classes	
	Shade	6 children referred, assessed and supported 3 discharged Small group work in reception focusing on attention, listening and early language (Chatterboxes) Key stage 2 intervention focusing on language (Language Legends)	

	<table><tr><td></td><td>Small group work in phonological awareness (Sounds Right)</td></tr><tr><td>St josephs</td><td>11 children referred, assessed and supported 4 discharged</td></tr><tr><td>Tod C of E</td><td>8 children referred, assessed and supported 4 children discharged Small group language intervention running in reception (Chatterboxes)</td></tr><tr><td>Walsden</td><td>7 children referred, assessed and supported 4 discharged Language groups running in reception (Chatterboxes) Whole class language intervention in Y3 (Language Legends)</td></tr></table>		Small group work in phonological awareness (Sounds Right)	St josephs	11 children referred, assessed and supported 4 discharged	Tod C of E	8 children referred, assessed and supported 4 children discharged Small group language intervention running in reception (Chatterboxes)	Walsden	7 children referred, assessed and supported 4 discharged Language groups running in reception (Chatterboxes) Whole class language intervention in Y3 (Language Legends)	
	Small group work in phonological awareness (Sounds Right)									
St josephs	11 children referred, assessed and supported 4 discharged									
Tod C of E	8 children referred, assessed and supported 4 children discharged Small group language intervention running in reception (Chatterboxes)									
Walsden	7 children referred, assessed and supported 4 discharged Language groups running in reception (Chatterboxes) Whole class language intervention in Y3 (Language Legends)									
Processes, Documentation	<b>LINGO Programme Summary</b>  <b>Project management</b> <ul style="list-style-type: none"><li>Regular updates between LINGO and the Todmorden cluster officer</li></ul> <b>Intervention for each school</b> <ul style="list-style-type: none"><li>LINGO met with Communication Lead clusters to manage the project at a school level</li><li><b>Interventions and resources</b> provided to support speech, language and</li></ul>									

	<p>communication development relevant for each phase</p> <ul style="list-style-type: none"> <li>• <b>Weekly</b> Speech and Language Therapy</li> </ul> <p><b>Resources for each school</b></p> <ul style="list-style-type: none"> <li>• <b>LINGO Chatterboxes</b>, supporting vocabulary, understanding and use of language for pupils in EYFS</li> <li>• <b>Language Legends</b> Intervention, supporting understanding of language, vocabulary, collaborative talk and reading comprehension in Key stage 2</li> <li>• <b>Sounds Right intervention</b> supporting phonological awareness (foundations for phonics and speech sounds)</li> <li>• <b>Additional resources</b> sent electronically related to training sessions / individual / group therapy sessions</li> </ul> <p><b>Professional development</b></p> <ul style="list-style-type: none"> <li>• <b>Training for interventions</b> with follow up support in school <ul style="list-style-type: none"> <li>○ Chatterboxes</li> <li>○ Language legends</li> <li>○ Speech sound development</li> </ul> </li> <li>• <b>Termly training</b> for class teachers and support staff to support best practice in the classroom.</li> <li>• <b>Ongoing professional development</b> through modelling of strategies by speech and language therapists in school</li> </ul>	
--	---	--

	<p><b>Strategic support</b></p> <p>Half termly meetings with Communication Leads/SENCOs. The aim of the meetings was to:</p> <ul style="list-style-type: none"> <li>• support planning and implementation of the project</li> <li>• encourage leads to share how things are working in their schools</li> <li>• troubleshoot any issues.</li> </ul>	
Staff skills, understanding	<p><b>Impact</b></p> <p>Overall, there has been a positive impact of the LINGO project on children, parents and schools in the Todmorden Cluster. Headteachers in the cluster, without exception, have all reported that the project has already had massive benefits for the pupils and was one of the best interventions they had experienced in their schools.</p> <p><b>Comments from Todmorden primary head teachers</b></p> <ul style="list-style-type: none"> <li>• <i>The most helpful aspect of LINGO has been the regular access to a therapist. We have so many needy children we are still working through</i></li> </ul>	

	<p><i>referrals. The guidance given has been excellent and has enabled us to offer much more focused support. We are still referring to S&amp;L but the waiting list and travel time for our parents make it very difficult to access.</i></p> <ul style="list-style-type: none"> <li>• <i>One boy in Year 2 had some specific difficulties with some sounds and pronunciation – he hadn't been self-aware of this until recently. This was really affecting his confidence. School had tried to refer him to S&amp;L previously, but his parents had refused, saying he would grow out of it. When we explained that our speech therapist was part of our team and could discreetly work on his issues his parents agreed. This child now has no speech and language issues. His confidence has massively improved both outwardly and across the curriculum.</i></li> <li>• <i>One boy in Year 4 is especially difficult to understand, he had reverted to not talking much in school and rarely gave input into lessons. He has had multiple referrals to Calderdale S&amp;L through his life but was only seen for 6 weeks at a time before being dropped. When I</i></li> </ul>	
--	---	--

	<p><i>approached mum about the speech therapist working with him in school, she asked whether this would be for 6 weeks only. When I explained no, it potentially be all year, or as long as he needs it, mum cried. We are understanding him more and more. This child is now a different boy in school, he is happier, brighter and even gives input into Collective Worship!</i></p> <ul style="list-style-type: none"> <li><i>• The LINGO speech therapist has just started to see a child in Nursery. Again he has been assessed as having good understanding and a good range of vocabulary but finds it hard to communicate his needs and wants especially to other children and this is affecting his behaviour. He joined us in January, we referred him to Calderdale S&amp;L in February and has been told he won't be seen until Dec 2022. Because our speech therapist is in house, he is being seen weekly and strategies are being shared now with staff and parents before his transition into school in Sept.</i></li> <li><i>• LINGO is just so much better in tackling and addressing individual</i></li> </ul>	
--	--	--



	<p><i>children's needs and has filled the tragic gaps in SALT services offered to Todmorden Children (which are now all virtual) and the staff have access to a specialist to support ongoing interventions in school - that specialist weekly support is priceless.</i></p> <ul style="list-style-type: none"> <li> <p><i>Lingo has been an incredibly useful intervention due to the nature of the programme. All children involved have made progress from Reception to Year 6 and this is due to the personalised interventions and the weekly face-to-face with the speech therapist. School has formed a positive working relationship with the therapist and the children have connected well to the interventions. Children are continually assessed and move on appropriately to ensure progress for all. The LINGO project is a useful intervention as we already use their programme 'Chatterboxes' and the intense interventions are a great continuation. All staff have noticed an increase in children's confidence, social skills and communication and language. We would love to continue the partnership with LINGO and participate in the project for the next academic year</i></p> </li> </ul>	
--	--	--

	<ul style="list-style-type: none"> <li>• <i>LINGO enables many of our pupils to have areas of speech and language addressed (particularly ks1/lower ks2 pupils) who would usually be on a long waiting list to be seen by the authority's speech and language therapist. The needs cannot always be catered for using NELI and LINGO enables a far greater range of needs to be met in a much more timely manner.</i></li> <li>• <i>One child has been supported with her social use of language, she now has more words to express herself and her feelings in school, this is helping her behaviour. This is because of the toolkit the speech therapist has given her.</i></li> <li>• <i>One child from Year 1, continues to be supported by the LINGO speech therapist. He is a bright boy but has very complex pronunciation issues. With the LINGO support the classroom staff have been given the alternative sounds he says for certain letters or phonemes, this has really supported his progress in early reading and phonics.</i></li> </ul>	
--	--	--

	<ul style="list-style-type: none"> <li><i>Due to how stretched the NHS SALT team are and how support from them is most of the time just initial assessment then suggested targets, we feel LINGO is vital for us as a cluster being able to support and reach our many children with SLC needs. NELI and Well COMM are great for early identification, but the support for the older children throughout school is just as important.</i></li> </ul> <p>Examples of feedback from SENCos, class teachers and pupils are available on request, please contact Helen Smith</p>	
<p><b>Comment, including effective practice to share</b></p> <p>It is clear from both in school and national data, there are high numbers of children attending Todmorden cluster schools (and indeed other schools across the borough) who are from families experiencing high levels of deprivation that can affect their life chances. We know that children living in these circumstances are at high risk of speech, language and communication needs (upwards of 50%). The pandemic has further impacted with fewer opportunities for social interaction and impact on school attendance.</p> <p>Evidence tells us that poor language can impact not only on educational attainment, but on wellbeing and mental health, exacerbating the impact of social deprivation. Children and families in Todmorden (particularly disadvantaged families) have not been able to access central services such as speech therapy as easily and find it difficult to access and afford services that are predominantly based in Halifax.</p> <p>Early language and communication support can make a real difference for these children and can mean that children with speech, language and communication needs in mainstream education have a greater chance of success if they receive the support they need in their own schools.</p> <p>The LINGO programme was therefore commissioned to address these needs, with the overall aim of the programme for all children to communicate to the best of their ability.</p>		

This was supported via four main elements:

- Building awareness, knowledge and skills in classroom teachers, SENCos and support staff to more accurately identify and support children with SLCN
- Providing evidence informed interventions to target aspects of speech, language and communication.
- Providing speech and language therapy support directly to children and indirectly through support staff.<sup>1</sup>
- Enabling professional learning of all staff through training and ongoing support to implement targeted interventions and individual support for children

The programme was compiled to meet the specific needs of the schools in the Todmorden cluster following initial audits with senior leaders. There was flexibility built in to allow for any changes in priorities, which was regularly discussed with Communication Leads during half termly meetings

The Todmorden Cluster Officer has shared the findings of Year 1 of the LINGO project throughout the year with Todmorden Cluster Headteachers and other professional colleagues in Calderdale.

#### **Reference to Funding Impact Report**

##### **Finance update**

A bid for £45K to finance Year 1 of the LINGO project was made to the Partnership Board in Autumn term 2021 and was successful. This was supported by additional funding from the Todmorden Cluster. A further bid to the Partnership Board for £67500 to fund year 2 of the project was successful in the Summer term 2022. This will now also benefit children attending schools in the Calder Valley Cluster and Todmorden cluster, a total of 23 primary schools and the two High schools, Calder High and Todmorden High will also be involved with the project in 2022/23.

# Report to Schools Forum

<b>Meeting Date</b>	Thursday 1 December 2022
<b>Subject</b>	Reforming how Local Authority school improvement functions are funded
<b>Report Author</b>	Connie Beirne Interim Service Manager for Early Years, Schools Strategy and Performance

## Report purpose

- a) To update members of the Schools Forum of the response by the LA to the reduction of the School Improvement Monitoring and Brokerage grant (SIMBG) in delivering its School Improvement function up to March 2023.
- b) To provide members with an overview of the present make-up of the School Effectiveness team in delivering our School Improvement Function.
- c) To advise members of the financial impact on the delivery of future Local Authority school improvement functions.
- d) To provide members with suggestions for discussion, on possible models of how the Local Authority will continue to provide its School Improvement Function from April 2023.

## 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

Paul Tinsley– Interim Assistant Director: Education and Inclusion  
[Paul.tinsley@calderdale.gov.uk](mailto:Paul.tinsley@calderdale.gov.uk)

Connie Beirne - Interim Service Manager for Early Years and School Strategy and Performance  
[Connie.beirne@calderdale.gov.uk](mailto:Connie.beirne@calderdale.gov.uk)

# Report to Schools Forum

## Background information and context

- a) 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.
- b) Consultation took place with headteachers on the 22<sup>nd</sup> and 24 June regarding a new model of delivery. Further permanent appointments into the existing SE team were not considered with the School Improvement Monitoring and Brokerage Grant (SIMBG) disappearing in March 2023. In introducing a SE Associate model, heads wanted to ensure that these professionals were creditable, well trained and be part of a rigorous quality assurance programme.
- c) On June 30, Schools Forum received a report regarding the future delivery of the LA school improvement function. This detailed the reduced capacity of the existing team, due to resignation and retirement as well as the unsuccessful attempts (5) to recruit to the Service Manager for Early years, School strategy and Performance post. At that point, members were also provided with three possible models of delivery going forward from 2023 for discussion.
- d) During June 2022, expressions of interest to work as a school effectiveness associate were received. In July 22, further conversations took place with existing headteachers as well as retiring Heads and existing consultants who are already highly respected by our headteachers. In order for the SE associates to be creditable, they were all required to receive a green risk assessment rating for their schools; thus, identifying they were good/outstanding and already outward facing and offering school to school support. Some of the individuals who came forward were already delivering our primary subject leader programme and had received excellent feedback from the participants that had attended. Some were also and continue to do so, delivering on the NPQs/ Early Careers Teachers programmes, being delivered by the Kirklees/Calderdale Teaching School Hub.
- e) Each SE associate was asked to complete a short application form detailing why they were interested in the post, what experience, skills and expertise they could offer and their available time they could give to the role. Individual meetings took place in August to align chosen SE associates with their maintained schools causing concern and rated amber (of some concern to the LA) or red (of high concern to the LA). Induction of all eight SE associates took place on Monday 12 September and they continue to attend monthly team meetings to access training and further support, as well as being able to talk with their peers. Ongoing support takes place during calls, meetings and emails.
- f) The SE team, begun their statutory function around maintained schools causing concern with two red schools and fifteen amber schools. Moving forward this year,

there was an increased level of support for amber schools at three days allocation of support per term and for red four days of support per term.

- g) Risk assessments of our schools are fluid and this means that following support from our SE team members or an ofsted inspection, risk ratings can alter. This will be agreed between the LA, headteacher and chair of governors at the school.
- h) With the SI Partnership Board also agreeing to fund a programme of support for new headteachers ( both academies/maintained – interim and permanent) at a breakdown of £3K per headteacher, an SE associate is working closely to deliver an effective programme of support as well as providing networking opportunities.
- i) In terms of costings, it was agreed that SE associates would receive a daily rate of £550, for the work undertaken. A total costing for the SE team for the autumn term 2022, works out at £87K. Paul Caladine has resigned from his post of Schools Assessment, Data, Moderation and Monitoring Officer as of the 30 November and this post will no longer exist. These roles will pass onto existing officers and through commissioned work undertaken by our experienced moderation managers at both key stages. Total costings going forward for the team during spring term 2023, are approximately £85K.
- j) Feedback from SE associates and the headteachers they are working with has been positive. One maintained school that has already had an Ofsted inspection, will return to a green risk assessment, shortly with their report being published. This means the associate who was working with the school, is now released and available should we need to undertake other SE work going forward. Although, starting with eight consultants/associates, we do expect numbers to reduce going through the course of this academic year 22-23, as schools continue to move from the risk assessment of amber/red back to green: as well as a small number of schools joining a MAT. This is happening for one of our amber maintained schools in January 2023.
- k) The cluster model continues to play a significant role in delivering School Improvement on behalf of the LA. Real strength and impact continues to be seen through the impact cluster reports sent to the School Improvement Partnership Board.
- l) Our highly successful Primary Subject Leaders development programme, funded directly by the School Improvement Partnership Board, continues to be delivered by existing Headteachers, some SE Associates from within the borough. This supports and reinforces the system leadership model of providing school to school support.

## **Main issues for Schools Forum**

### **Need for consideration**

- a) The funding for the School Effectiveness team available through the School Improvement Monitoring and Brokerage Grant (SIMBG) ceases in March 2023; so, funding will be 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) Following the successful SE Associate model, it would make sense for this to continue into summer 2023, with a revised model implemented from September 2023. It makes no sense to adjust the way the SE team are working with our schools halfway through the academic year. This would be most unsettling for our headteachers of schools in a vulnerable position. It would be unlikely that we would be able to implement the staffing structure in time for an April 2023 start. The approximate costing of the team for the summer term 2023, would be £97K (including the delivery of our statutory duty around moderation at KS1 and 2).
- c) Consideration also needs to be given to the reducing number of maintained schools causing concern joining a MAT, this is likely to reduce from 17 by a possible further 4 schools by the end of the academic year.
- d) This SE associate model also sits well with the SI cluster model which both academies and maintained schools' benefit from. There is no intention to change the existing cluster model approach.
- e) A review of the role of the Service Manager for Early years, school strategy and performance is being undertaken as recruitment has not been successful to this post. The interim post holder's contract has been extended to April 2023.
- f) A School Effectiveness options appraisal exercise is presently taking place in November 2022; so, these models can be presented to members at their January meeting for consideration.

## **Recommendations**

For School Forum members to recognize the successful delivery of the LA school improvement function during the autumn term 2022, involving a smaller number of officer input as well as SE associates and look to continue to support and fund this model going forward into the summer term 2023; to provide the stability needed for our schools causing concern. This would provide schools forum with additional time for consultation with Headteachers, as to the chosen model for a September 23 delivery.

For School Forum members to consider the changing educational landscape and the need to work in partnership with all stakeholders to delivery the best education for all the borough's children.

## **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 and 1 September 2023 start date/s.
- b) For a decision to be made, on the funding through DSG of the future chosen delivery model for the summer term 23 and the following academic year 23/24.

## **Resource implications**

- a) All professionals, funding and resources to be in place by 31 March 2023 for the summer term model and by 31 August 23 for a 1 September commencement.



# Report to Schools Forum

<b>Meeting Date</b>	1 December 2022
<b>Subject</b>	School Place Planning
<b>Report Author</b>	Richard Morse

<b>Report purpose</b>
To provide information on how the demand for school places is projected and planned across Calderdale (the Local Authority's annual Planning of School Places Document).

<b>Need for consideration</b>
For Information Only

<b>Need for decision</b>
Not Applicable

<b>Contact Officers</b>
Richard Morse School Organisation and Access Manager Education and Inclusion Children and Young People's Services Telephone: 01422 392501 E-mail: <a href="mailto:richard.morse@calderdale.gov.uk">richard.morse@calderdale.gov.uk</a>

# **Report to Schools Forum**

## **1. Background information and context**

The Education (School Organisation Committee) Regulations 1999 introduced the requirement for all local authorities to establish a School Organisation Committee (SOC) to consider all local school organisational proposals (such as school expansions, closures amalgamations etc).

The membership of such committees was prescribed within the regulations and included local elected members and other participants drawn from the learning community.

As well as prescribing a role within local decision making, The Education (Schools Organisation Plans) Regulations 1999 also involved SOC's in the production and approval of each Local Authority's School Organisation Plan (SOP).

The broad content of such plans was outlined within the regulations with the purpose of providing the contextual and demographic data to support 'decision makers' through decision making processes around school organisational issues.

Decision makers for proposals are determined in statute and vary depending on the category of school and the nature of the proposals put forward. These include local authorities (in Calderdale, Cabinet would be the decision-making body for school organisation proposals affecting community schools), governing bodies (foundation schools), academy trusts and both Anglican and Catholic diocesan bodies. Further guidance can be found on the DfE (school organisation) website.

The statutory requirement to produce SOP's was repealed in March 2005 and the Education and Inspections Act 2006 removed the requirement for SOC's. Calderdale's SOC was disbanded at this point along with others nationally.

The strategic value of having pupil projections was however recognised and therefore the decision was taken in Calderdale to continue to produce the document despite the removal of the statutory obligation to do so.

Whilst the format has evolved and additional information has been added, the document retains much of the original prescribed structure.

The document has taken on an additional importance as from 2012 the DfE introduced an annual School Capacity return which requires data on current places within the Borough (established using Academy funding agreements or Net Capacity Assessments) as well as pupil projections. This highlights where there is a shortage of provision and is used to determine the allocation of funding to Calderdale for the creation of additional school places (Basic Need).

## **Planning of School Places**

The Local Authority has a statutory duty to ensure that all children in the local authority area are allocated a school place. The Planning of School Places document is produced to enable us to ensure that we have a sufficient number of places available in schools across the borough.

The document includes information relating to historical pupil numbers and projected pupil numbers, housing data and current school capacity.

## **Planning Areas**

Calderdale employs 15 planning areas when looking at primary pupil projections and 4 for secondary (the latter introduced for 2022 returns onwards). There is no specific requirement or science as to how the planning areas are drawn up, but broadly schools are grouped geographically around the population centres that they predominantly serve.

Planning areas have to be approved with the DfE and therefore require a sound rationale. The Authority would like more planning areas for Secondary (some of the groupings cover areas that would pose challenges for pupils in terms of travelling distances) but we could not secure agreement for this.

## **Primary Provision**

Projected pupil figures for forthcoming years are calculated using data provided by the local health trust (GP registrations), housing data from the Local Authority's planning department and historical preferencing patterns.

The historical proportional distribution of pupils from each postcode is used to determine what the future distribution of pupils is likely to be (with a weighting given to the most recent year of preferencing).

## **Secondary Provision**

Projections for secondary schools had not until this year been split into planning areas but were kept at individual school level. There is a diversity of provision in the borough; a mix of selective - grammars, non-selective with an element of intake based on aptitude related to specialism (music, sport etc) and finally fair banding. Varying degrees of popularity relating to an individual schools' outcomes, Ofsted assessments and parental preference for a particular category of school means that significant numbers of pupils do not simply elect for the school closest to home.

Projections for secondary draw upon the pupil numbers on roll within the primary sector due to transition to Secondary, factored against historical preferencing patterns.

For the purpose of the Authority's sufficiency returns to the DfE, the data is presented per planning area, but it is likely that these will need review after an initial period to ensure they are as reflective as possible of the need for any additional provision.

## **Housing**

In line with primary projections this data is broken down into planning areas recognising that most primary aged pupils will attend one of the nearest primary schools to their home address.

For projection purposes we only count those units that are currently under construction (as many planning applications do not proceed or are resubmitted with revision at a later date). The number of units where work has not commenced is included for reference purposes, but no projected pupil yield is included within projections for these units.

It is important to understand that this data only relates to housing where an application for planning permission has been submitted and it does not represent the full picture. Mid to long term developments as identified within the Local Plan need to be taken into consideration when planning a longer-term strategy around sufficiency.

## **Areas for Development**

Post 16 provision projections have now been reintroduced into the document however these should be used with caution. Until recently many schools had their own sixth form and projections were drawn up using an historical stay on rate. Whilst not very technical in nature (there was no adjustment for those leaving for provision elsewhere or joining for the first time), these nevertheless proved fairly accurate.

Closure of sixth forms across the borough and the establishment of Trinity Sixth in central Halifax requires a different approach.

Additional reporting requirements require the submission of post 16 projections to the DFE from next year and this will have relevance to the sufficiency funding allocated to Calderdale to meet its obligations in this area.

Discussion with C&K careers and the DFE will take place over the course of the year to determine the best approach to this. Unlike pre 16 provision, there is no direct LA involvement in the allocation of places at individual school level and no cross-border coordination of applications so this work will come with a different set of challenges to projections for the 5 to 16 arena.

Special Needs data is included within the document, showing where pupils with additional needs are taught; those in mainstream and those in specialist provision.

Additional reporting requirements, as with post 16, demand that projection data in this area will need to be developed further – this also applies to Alternative Provision and to those educated in private settings.

## **Broader Context**

The planning of school places document has a particular focus around the need for understanding demand in schools and subsequently planning for school expansions or conversely consolidation of provision. It has a particular relevance to securing funding to address issues around sufficiency (the data is used for the LA's SCAP return to the DFE).

The Planning of School Places document focuses on the short to mid-term as a consequence and does not provide the full picture. Longer term thinking and planning needs to take into account developments around the Local Plan and bring in the experience of officers, not necessarily reflected in the formulaic data produced in this document.

The Local Plan that the Authority is in the process of consulting over and adopting, outlines housing policy and planned development for the next 10 to 15 years. SCAP projections do not take any 'potential' developments into account, but it is useful for 'decision' makers to be aware of the full potential for future housing and additional demand when looking at school place sufficiency issues.

## **Using and Interpreting the Data**

For decision makers using this document there are a number of important issues to understand about what the figures say.

There are known constants and known variables within the data, and it is important to understand these before the figures are used for planning purposes.

Total figures within the document will generally be accurate (although there is some scope for migratory factors to affect these). The totals reflect the number of children in the education system in Calderdale and are accurate. The projected demand for one individual school over others can however vary if circumstances change; the outcome of Ofsted reports for example can suddenly change the pattern of preferencing in a particular area.

The document is intended to identify the demand for places within individual schools rather than to make any bold statement around the exact number of pupils allocated to each individual school each year. You will therefore observe that some schools have projected numbers which exceed the number of places that they have available. This does not mean that pupils will be allocated over number.

Undersubscribed schools that neighbour schools with oversubscription are likely to benefit from an allocation that exceeds the demand for places shown, hence the need to consider the broader data rather than to take individual school data out of that broader context.

Wherever there are changes to a school's capacity, any increase or decrease to a school's Admission Number, it is important to understand that this will not reflect immediately in pupil projections for that school – due to the nature of the calculations behind the projections (i.e., the factoring of historical preferences and allocations) changes can take a year or two to accurately reflect.

Officers use the data in this document when completing the annual SCAP (School Capacity) survey for the DfE each year. The DfE in turn use this data to determine how much funding each local authority will receive for basic need.

### **Basic Need and the Schools Capital Programme**

Basic need is the term used to describe the need for additional pupil places. The SCAP survey completed each year informs the DfE as to the need for additional school places and an allocation of funding is awarded based upon the data submitted.

Information on how the Local Authority has spent its Basic Need funding is also required and authorities are scored on this (RAG rated). This is to ensure that money intended to create additional school places is not diverted into addressing maintenance issues (although where there is scope to do so, schemes can be commissioned with a mix of Capital Maintenance and Basic Need funding - where it is possible to carry out an expansion and refurbishment programme for example).

If an Authority overestimates the need for additional provision and is consequently over funded, then future funding is adjusted to reflect this. It is important therefore that projections are as accurate as possible to ensure that budgets are clearly defined for those decision makers who prioritise spending in this area.

## **2. Conclusion**

This report is provided for information. The Planning of School Places document is produced annually and uploaded to the Authority's website.

A new webpage is currently being prepared following feedback from schools on the difficulty of finding this document and a link to the new page will follow in due course.

## **3. Appendices**

Planning of School places document sent with the agenda

# Report to Schools Forum

<b>Meeting Date</b>	1 December 2022
<b>Subject</b>	School Funding 2023/24
<b>Report Author</b>	Jane Davy

<b>Report purpose</b>
To consult members of Schools Forum with the latest proposals for school funding for 2023/24 based on the DfE 2023-24 Operational Guidance and the indicative funding notified to the LA.

<b>Need for consideration</b>
Calderdale has received indicative schools block funding, based on October 21 data, of £182.1m (excluding growth fund but including supplementary grant), this is an increase of £3.1m on 2022/23 funding.

<b>Need for decision</b>
Decision on MFG exemptions need.

<b>Contact Officers</b>
<p>Jane Davy  Acting Team Leader LMS Team  <a href="mailto:Jane.davy@calderdale.gov.uk">Jane.davy@calderdale.gov.uk</a>  01422 393543</p>

## Report to Schools Forum

### Background information and context

In July 2022 the DfE released the indicative funding for LA's based on Oct 2021 data. The LA will still calculate local formulae for 23/24 in accordance with the DfE's Operational Guidance.

The DfE have updated the NFF with new factor values and made some technical changes. Detailed below are key changes;

- Rolling the 22/23 schools supplementary grant into the NFF by:
  - i) Adding an amount representing what schools receive through the grant into their baselines
  - ii) Adding the value of the lump sum, basic per pupil rates and free school meals Ever 6 (FSM6) parts of the grant onto the respective factors in the NFF
  - iii) Uplifting the minimum per pupil values by the supplementary grant's basic per pupil values, and an additional amount which represents the average amount of funding schools receive from the FSM6 and lump sum parts of the grants
- Increasing NFF factor values (on top of the amounts we have added for the schools supplementary grant) by:
  - i) 4.3% to free school meals at any time in the last 6 years (FSM6) and income deprivation affecting children index (IDACI)
  - ii) 2.4% to the basic entitlement, low prior attainment (LPA), FSM, English as an additional language (EAL), mobility, and sparsity factors, and the lump sum
  - iii) 0.5% to the floor and the minimum pupil levels (MPPL)
  - iv) 0% for the premises factors, except the Private Finance Initiative (PFI) which has increased by Retail Prices Index excluding mortgage payments (RPIX) which is 11.2 % for the year April 2022.
- As set out in the response to the 21/22 consultation on the direct NFF, local authorities will be required to bring their own formulae closer to the schools NFF from 2023/24. In particular:
  - i) Local authorities will only be allowed to use NFF factors in their local formulae. This means that the looked after children (LAC) factor will no longer be an allowable factor, Calderdale do not use this factor in the local formulae so no effect.
  - ii) Local authorities must use all NFF factors – except locally determined premises factors which remain optional. This means that local authorities will have to use all 3 deprivation factors (FSM, FSM ever 6 and IDACI), as well as LPA, EAL, mobility, sparsity and lump sum. Calderdale used all these factors when setting the 2022/23 local formulae so no effect.
  - iii) Local authorities must move their local formula factor values at least 10% closer to the NFF, except where local formula is already mirroring the NFF. These criteria do not apply to the premises factors. Calderdale mirror all but the basic entitlement in the NFF.



iv) Local authorities must use the NFF definition for the EAL factor, although flexibility over the sparsity factor will remain for 2023/24. Calderdale mirror the NFF for both factors.

- Local Authorities have the freedom to set the MFG in the local formulae between +0.0% and +0.5 per pupil. This is a reduction from 2% in 2022/23, this is set by the ESFA, and the LA are unable to change the % range.

## Main issues for Schools Forum

LA officers are proposing that Calderdale adopt the formula factor values used to calculate the school block allocation as shown below, 2022/23 values have been included for comparison.

	2022/23		2023/24	
	Primary	Secondary	Primary	Secondary
Basic Entitlement				
KS1&2	3,217		3,394.54	
KS3		4,536		4,785.77
KS4		5,112		5,393.86
Deprivation				
FSM	470	470	480.08	480.08
FSM6	590	865	705.11	1030.16
IDACI A	640	890	670.11	930.15
IDACI B	490	700	510.08	730.12
IDACI C	460	650	480.07	680.11
IDACI D	420	595	440.07	620.10
IDACI E	270	425	280.04	445.07
IDACI F	220	320	230.04	335.04
Attainment	1,130	1,710	1,155.18	1,750.28
EAL	565	1,530	580.09	1,565.25
Mobility	925	1,330	945.15	1,360.22
Lump Sum	121,300	121,300	128,020.48	128,020.48

### Split Site

The LA will receive the same amount in 2023/24 as 2022/23 i.e., £24,260 per split site school. However, our split site criteria states that split site is equal to 20% of the lump sum, rather than change the criteria the LA propose to pay split sites £25,604.10 which represents a 5.536% increase.

## Capping

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

## MFG

In the December 2019 consultation 84% of respondents agreed that MFG is set at the most affordable level within the funding envelope, therefore it is proposed to set MFG at the highest level possible up to the maximum of 0.5% allowed under the regulations.

Disapplication requests.

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

Modelling on 2021 data and expected Sept 22 pupil numbers indicates Halifax Academy would qualify for MFG and would be over protected by £28.60 per pupil and Calder High would not qualify for MFG. However, calculations show that Calder High would be under protected by £8.84 per pupil if MFG has to be applied once the Oct 2022 data is applied. Modelling on 2021 data indicates that the two through schools do not currently qualify for MFFL.

The schools have been consulted in writing and asked for objections to by 30 November 2022. The LA will apply for disapplication after this date.

## Modelling

The funding formula has been modelled on October 21 data and calculated in accordance with the above proposals, the impact of those proposals can be seen in Appendix 1.

In summary modelling shows;

7 schools would remain on MFG and as a minimum receive 0.05% increase per pupil. MFG disapplication (if approved) would be applied to one through school. 11 Schools would receive funding under the mandatory minimum funding level factor. MFFL disapplication would not be required. However, one school may qualify when final data is applied.

Currently modelling shows that the proposals are affordable, leaving £306k additional funding to be allocated, if when running the actual October 2022 data in the formula this is still the case the excess funding will be allocated to the basic entitlement factor for both sectors. However, if it found there is a shortfall of funding the formula will be adjusted, as in previous years, in the following order;

- 1) Reduce MFG (but no lower than +0 %)
- 2) Introduce capping for gaining schools (except those schools who would gain through receiving MFFL funding).

### **Consultation with schools**

The Local Authority has a requirement to consult with both maintained schools and academies on the changes to the funding formula. The LA is not proposing to make any changes other than those adjusting the formula factor rates to mirror those in the NFF. Therefore, consultation with schools is not required. Consultation is required with School Forum the local formulae and on the MFG and MFFL Disapplication and report the outcome to the ESFA.

### **Recommendations**

- Note the mandatory changes to the 2023/24 funding formula
- Consider and give a view of the proposals for the 2023/24 Schools Funding Formula including the disapplication requests.

## Appendix A

	2022/2023		2023/2024		Difference in funding	
School Name	Pupil Numbers	Funding Formula (inc supplementary grant) £	Pupil Numbers	Indicative Funding Formula £	Increase/Decrease	% Increase/Decrease
Abbey Park Academy	195	1,017,419	195	1,043,731	26,312	2.59%
Trinity at Akroydon Primary	322	1,609,189	322	1,650,244	41,055	2.55%
All Saints' CofE VA Junior and Infant School	211	928,455	211	932,399	3,944	0.42%
Ash Green Community Primary School	411	2,258,237	411	2,318,639	60,402	2.67%
Bailiffe Bridge Junior and Infant School	198	887,534	198	908,359	20,826	2.35%
Barkisland CofE VA Primary School	192	844,403	192	848,550	4,147	0.49%
Beech Hill School	459	2,496,958	459	2,508,729	11,771	0.47%
Bolton Brow Primary Academy	208	935,561	208	954,921	19,360	2.07%
Bowling Green Primary School	139	667,493	139	683,354	15,860	2.38%
Bradshaw Primary School	330	1,452,746	330	1,459,744	6,998	0.48%
Brighouse High School	1,038	6,132,655	1,038	6,278,720	146,065	2.38%
Burnley Road Academy	187	889,964	187	911,666	21,702	2.44%
Calder Learning Trust	1,388	8,099,371	1,388	8,291,243	191,872	2.37%
Carr Green Primary School	311	1,399,076	311	1,429,582	30,506	2.18%
Castle Hill Primary School	194	910,731	194	932,320	21,590	2.37%
Central Street Infant and Nursery School	59	372,144	59	373,308	1,164	0.31%
Christ Church CofE VA Junior School, Sowerby Bridge	118	636,169	118	651,850	15,682	2.47%
Christ Church Pellon CofE VC Primary School	165	926,671	165	950,457	23,786	2.57%
Cliffe Hill Community Primary School	186	1,023,905	186	1,028,230	4,325	0.42%

Colden Junior and Infant School	81	476,881	81	488,037	11,156	2.34%
Copley Primary School	274	1,232,998	274	1,238,970	5,972	0.48%
Cornholme Junior, Infant and Nursery School	164	871,814	164	892,970	21,156	2.43%
Cross Lane Primary and Nursery School	302	1,493,334	302	1,530,366	37,032	2.48%
Dean Field Community Primary School	198	1,079,880	198	1,108,310	28,430	2.63%
Elland CofE Junior and Infant School	162	938,408	162	963,095	24,687	2.63%
Ferney Lee Primary School	182	1,016,577	182	1,030,564	13,987	1.38%
Field Lane Primary School	96	599,961	96	615,358	15,397	2.57%
Hebden Royd CofE VA Primary School	83	433,014	83	440,845	7,831	1.81%
Heptonstall Junior Infant and Nursery School	68	402,531	68	406,243	3,712	0.92%
Holy Trinity Primary School, A Church of England Academy	359	1,725,958	359	1,768,628	42,670	2.47%
Holywell Green Primary School	173	841,208	173	854,124	12,916	1.54%
Lee Mount Primary School	317	1,667,329	317	1,709,745	42,416	2.54%
Lightcliffe Academy	1,052	6,458,956	1,052	6,614,752	155,796	2.41%
Lightcliffe CofE Primary School	409	1,795,553	409	1,807,072	11,520	0.64%
Ling Bob Junior, Infant and Nursery School	301	1,654,992	301	1,697,112	42,120	2.55%
Longroyde Primary School	364	1,629,602	364	1,669,780	40,178	2.47%
Luddenden CofE School	117	644,896	117	660,104	15,208	2.36%
Luddendenfoot Academy	189	832,982	189	849,361	16,378	1.97%
Midgley School	93	487,180	93	498,347	11,167	2.29%
Moorside Community Primary School	205	1,156,949	205	1,186,380	29,431	2.54%
Mount Pellon Primary Academy	328	1,760,387	328	1,768,506	8,119	0.46%
New Road Primary School	147	788,715	147	791,959	3,245	0.41%
Norland CE School	93	488,522	93	500,117	11,596	2.37%
Northowram Primary School	410	1,830,324	410	1,841,122	10,798	0.59%
Old Earth Primary School	416	1,831,212	416	1,863,810	32,598	1.78%
Old Town Primary School	80	434,198	80	444,339	10,142	2.34%

Park Lane Academy	454	3,429,275	454	3,525,725	96,450	2.81%
Parkinson Lane Community Primary School	508	2,633,016	508	2,697,936	64,920	2.47%
Rastrick High School	1,678	9,826,510	1,678	10,063,115	236,604	2.41%
Ripponden Junior and Infant School	193	891,125	193	911,709	20,584	2.31%
Riverside Junior School	150	713,920	150	723,418	9,498	1.33%
Ryburn Valley High School	1,378	8,345,894	1,378	8,563,749	217,855	2.61%
Sacred Heart Catholic Voluntary Academy	169	844,647	169	865,558	20,911	2.48%
Salterhebble Junior and Infant School	210	988,779	210	1,012,408	23,629	2.39%
Salterlee Primary School	102	498,041	102	509,694	11,653	2.34%
Savile Park Primary School	388	2,413,305	388	2,424,478	11,174	0.46%
Scout Road Academy	105	521,688	105	526,581	4,894	0.94%
Shade Primary School	178	848,562	178	868,805	20,243	2.39%
Shelf Junior and Infant School	257	1,140,935	257	1,146,431	5,496	0.48%
Siddal Primary School	191	995,956	191	1,021,388	25,432	2.55%
Trinity Academy St Peters	115	664,813	115	681,572	16,758	2.52%
St Andrew's Church of England (VA) Infant School	155	770,953	155	789,728	18,775	2.44%
St Andrew's CofE (VA) Junior School	216	1,030,334	216	1,055,570	25,237	2.45%
St Augustine's CofE VA Junior and Infant School	153	897,236	153	920,083	22,847	2.55%
Trinity Academy St Chads	173	766,720	173	776,216	9,495	1.24%
St John's (CofE) Primary Academy, Clifton	207	911,998	207	924,216	12,217	1.34%
St John's Primary School In Rishworth	146	654,423	146	669,560	15,137	2.31%
St Joseph's Catholic Primary School	186	858,410	186	875,736	17,326	2.02%
St Joseph's Catholic Primary School, Brighouse	197	898,590	197	920,091	21,500	2.39%
St Joseph's RC Primary School, Todmorden	141	775,764	141	795,319	19,555	2.52%
St Malachy's Catholic Primary School, A Voluntary Academy	162	971,674	162	997,350	25,676	2.64%

St Mary's Catholic Primary School	290	1,434,598	290	1,470,539	35,941	2.51%
St Mary's CofE (VC) J and I School	99	499,769	99	511,358	11,589	2.32%
St Michael and All Angels CofE Primary & Pre School	187	844,012	187	864,257	20,245	2.40%
St Patrick's Catholic Primary School	109	570,920	109	584,816	13,895	2.43%
Stubbings Infant School	31	251,713	31	257,587	5,875	2.33%
The Brooksbank School	1,465	8,777,228	1,465	8,989,103	211,876	2.41%
The Crossley Heath School	907	5,179,566	907	5,205,726	26,160	0.51%
The Greetland Academy	403	1,794,603	403	1,806,784	12,181	0.68%
The Halifax Academy	1,406	9,374,460	1,406	9,420,491	46,031	0.49%
The North Halifax Grammar School	903	5,154,636	903	5,186,040	31,405	0.61%
Todmorden CofE J, I & N School	204	1,006,268	204	1,031,255	24,987	2.48%
Todmorden High School	883	5,458,970	883	5,590,792	131,822	2.41%
Triangle CofE VC Primary School	200	915,759	200	937,027	21,267	2.32%
Trinity Academy Grammar	891	6,435,710	891	6,561,200	125,490	1.95%
Trinity Academy, Halifax	1,587	10,315,102	1,587	10,575,211	260,109	2.52%
Tuel Lane Infant School	69	424,909	69	428,307	3,398	0.80%
Wainstalls School	208	914,226	208	918,211	3,985	0.44%
Walsden St Peter's CE (VC) Primary School	165	779,952	165	794,069	14,117	1.81%
Warley Road Primary Academy	478	2,394,370	478	2,454,566	60,195	2.51%
Warley Town School	142	659,180	142	674,554	15,375	2.33%
West Vale Primary School	138	730,008	138	748,223	18,215	2.50%
Whitehill Community Academy	630	2,825,326	630	2,896,843	71,516	2.53%
Withinfields Primary School	310	1,417,673	310	1,451,579	33,906	2.39%
Woodhouse Primary School	420	1,867,207	420	1,879,540	12,333	0.66%
<b>Total</b>	<b>32,911</b>	<b>181,381,775</b>	<b>32,911</b>	<b>184,900,578</b>	<b>3,518,803</b>	<b>1.94%</b>

# Report to Schools Forum

<b>Meeting Date</b>	1 December 2022
<b>Subject</b>	Growth Fund
<b>Report Author</b>	Jane Davy

<b>Report purpose</b>
1) To provide members of Schools Forum with a report on how the Growth Fund has been allocated to schools in 2021-22, the expected expenditure for 2022-23 and to agree the amount of DSG (schools block) to be retained for this purpose in 2023-24.

<b>Contact Officers</b>
<i>Jane Davy-Acting Team Leader LMS Team</i>  01422 393543 <i>Jane.davy@calderdale.gov.uk</i>



# Report to Schools Forum

## 1. Background information and context

- a) Under the Schools Finance (England) Regulations local authorities, in agreement with their Schools Forum, can retain DSG (schools block) to establish a Growth Fund (before distributing formula funding to schools) to fund agreed expansion at schools in a response to increasing numbers of children.
- b) A school with an additional form of entry from September would ordinarily only receive formula funding from the following April. Expanding schools will not only incur the costs of educating those children in that period but will also have setting up costs (preparing classrooms, providing materials and resources) and have some lead in costs (recruitment and salary costs). The Growth Fund allows local authorities to provide funding to meet those costs for each new intake (7 years for a primary and 5 years for a secondary school).
- c) In June 2021, after consultation with schools a revised criteria was agreed for Growth and was implemented from April 2022, see Appendix 2,
- d) For 2021-22 and 2022-23 Schools Forum agreed the Growth Fund should be set at £500k and £580.5K respectively. Any under/overspends would be carried forward to 2023-24.

## 2. Main issues for Schools Forum

### Need for consideration

- e) For the academic year 2021-22 the Local Authority agreed an expansion of pupil numbers and a Growth Fund allocation for the following schools: Copley Primary (half a form), Calder High (one form), Trinity Academy Halifax (one form) Rastrick High (one and a half forms), Brooksbank (half a form), Ryburn Valley High (45 pupils) and Trinity Grammar (one form)
- f) The final allocations made from the Growth Fund for the 2021-22 financial years totalled £1,062,061 leaving a surplus of £139,326 (after receipt of £306k from the ESFA for the academies). Original forecast reported to School Forum in November 2021 was for a surplus of £85k a difference of £54k is due to a reduction of numbers required at Trinity at Sowerby Bridge.
- g) The allocations made from the Growth Fund for 2021/22, and the estimated continued allocations for future years for these schools are shown in Appendix 3. From Sept 2022 the Adults and Children's Schools Reorganisation Team has advised that all the schools detailed in 3a) above will continue to receive funding.
- h) Based on the above projected commitments there will be a surplus within the Growth Fund for 2022/23 estimated at £175k which, School Forum are asked to approve to carry forward to 2022/23.
- i) A Table showing the above allocations can be found at Appendix 3.
- j) Growth funding is allocated to local authorities using a formulaic method based on lagged growth data. The ESFA have not yet given an indication of the funding for 23/24 However, the LA is requesting that all the growth funding allocation is

set aside to fund both Growth Funding and Falling Rolls Fund. When final allocations are known in December, a report will be brought to the January Schools Forum detailing the exact amounts required for both funds, any surplus funds will be distributed in the schools funding formula.

## **2) Recommendations**

- a) Schools Forum notes the Growth Fund allocations for 2021-22.
- b) Schools Forum notes the estimated expenditure for 2022-23 and the amount to carry forward 2023-24.
- c) Schools Forum agrees in principle to retain all the growth fund allocated in the schools block DSG (Schools Block) for the 2023-24 Growth Fund and Falling Rolls Fund. Current funding estimate required is £20k for growth and £153.7k for falling rolls (total £173.7k). A report will be brought to the January School Forum detailing the exact amounts required.

## **3) Reasons for recommendations**

- a) The LA should report the expenditure and balance of Growth Fund in accordance with the School Finance Regulations to schools forum.
- b) As Growth Fund is within the schools block, a movement of funding from the schools formula into the growth fund would not be treated as a transfer between blocks. Schools Forum has to agree the amount of funding set aside for the Growth Fund.

## **4) Impact of funding, targets and milestones**

Growth Fund supports growth in pre-16 pupil numbers to meet basic need, a maintained school with an additional form of entry from September would ordinarily only receive formula funding from the following April, academies would only receive formula funding from the following September. Expanding schools will not only incur the costs of educating those children in that period but will also have setting up costs (preparing classrooms, providing materials and resources) and have some lead in costs (recruitment and salary costs).

## **5) Resource implications**

Funding should be met from the 23/24 schools block growth allocation. The exact amount will not be known until mid December 2022 and will be reported to Schools Forum at the January meeting.

Funding for growth cannot be met from any other sources of funding. Therefore, if funding is not retained from the schools block, growing schools will not receive enough funding to support the additional pupils in that school until the following April or Sept for maintained schools and academies respectively.

## 6) Appendices

### Appendix 1

#### Growth Fund Criteria

##### Original criteria – December 2013

- a. In order to qualify for Growth Funding, schools are required to formally request and obtain written approval to expand from the Director of Children & Young People's Services prior to school expansion.
- b. Expansions of at least half a class (15 pupils) will be funded from the Growth Fund.
- c. Permanently expanding schools will qualify for funding from the Growth Fund for each year of the expansion phase programme. For primary schools this will typically be 7 years and correspondingly would be 5 years for secondary schools.
- d. Funding will be provided at the appropriate Basic Entitlement rate for the expanding class based upon the actual number of additional pupils in Reception or Year 7. Below is an example for a new primary class of 30 opening in September 2014 (i.e. where October 2013 census numbers were 30 less);

Primary Basic Entitlement unit value = £2,837

September 2014 to March 2015 = 7/12ths of financial year

$£2,837 \times 30 \times 7/12\text{ths} = £49,648$

- e. This funding is intended to support the additional direct revenue costs associated with the expansion; teaching and support staffing costs, resourcing equipment for classrooms and senior management costs associated with implementing the permanent expansion, before the increase in pupils is reflected in the main funding formula.
- f. For maintained schools, from the following April (i.e. April 2015 in this example), the additional pupils would be funded in the normal funding formula based on October 2014 pupil data.
- g. In the case of academies, their funding is on an academic year basis and therefore the Local Authority would be responsible for providing funding for a further 5/12ths in the following financial year (i.e. April to August). The DfE will then adjust Calderdale's DSG allocation to recognise that the Local Authority has provided additional funding in the following financial year ('recoupment').

- h. The Growth Fund can only be used for the purposes of supporting growth in pre-16 pupil numbers to meet basic need. Funds must be used on the same basis for the benefit of both maintained schools and academies.
- i. The criteria and the total sum to be top-sliced from DSG need the agreement of Schools Forum and the Education Funding Agency (EFA) who check criteria for compliance.
- j. Any funds remaining in the Growth Fund at the end of the financial year must be added to the following year's DSG and reallocated to maintained schools and academies through the local formula. Conversely any overspend would need to be met from the following years DSG allocation.

#### **Criteria added in April 2014**

- k. Additional basic need provision on a different site will also attract;
  - Split site funding at the current rate applicable e.g. 7/12ths £12,833, full year £22,000.
  - A lump sum to reflect reasonable start-up costs up to a maximum of £35,000 for one form of entry and a maximum of £50,000 for two forms of entry.
- l. Pupil increases qualifying for growth funding should be funded in multiples of 30 for the first year (to provide a certain level of protection should actual intake be less than a full form of entry) and multiples of 15 for subsequent year's intakes.
- m. To recognise additional pupil needs – supplement the basic entitlement funding for additional pupil needs (deprivation, prior attainment, looked after children, English as an additional language) by using the proportion of eligible children already at the school at 7/12ths of the current rates for these factors.
- n. Provide additional rates costs – provide a sum equivalent to any additional business rates incurred by the school.

### **Calderdale Growth Fund Criteria**

1. The growth fund will only be used to:
  - support growth in pre-16 pupil numbers to meet basic need.
  - support additional classes needed to meet the infant class size regulation.
  - Meet the costs of new schools where the new school is the result of a LA led proposal required to meet basic need.
  - Growth (permanent and bulge) must be approved by the Local Authority in advance.
2. The growth fund will not be used to support:
  - schools in financial difficulty; any such support for maintained schools should be provided from a de-delegated contingency.
  - general growth due to popularity, this will be provided for in the school's annual allocation.
3. Growth funding
  - Growth in September 2022 will be funded from September 2022 to March 2023 (7/12ths) in maintained schools and from September 2022 to August 2023 in academies.
  - The ESFA will refund 5/12ths of the growth funded to academies in the following financial year.
  - Expansions of half a class (up to 15) and upwards will be funded from the growth fund.
  - Permanently expanding schools will receive growth funding for 7 years in primary and 5 years in secondary, to make up the shortfall in funding for reception and Y7.
  - The AWPU (based on September 2022 values) was £3,221.70 for primary and £4,542 for secondary. The AWPU will be revised annually.
  - **Full form of entry up to 30 pupils**

Each new form of entry will receive a first-year funding guarantee of a minimum of  $7/12 \times 25 \times \text{AWPU}$ , for the period September to March for maintained schools, and September to August for academies.

If more than 25 pupils appear on the October census for reception or year 7 additional AWPU will be allocated (up to a maximum of 30).

There will be no claw-back if less than 25 pupils appear.

- **Half form of entry up to 15 pupils**

Each new half form of entry will receive a first-year funding guarantee of a minimum of  $7/12 \times 12.5 \times \text{AWPU}$ , for the period September to March for maintained schools, and September to August for academies.

If more than 12.5 pupils appear on the October census for reception or year 7, additional AWPU will be allocated (up to maximum of 15).

There will be no claw-back if less than 12.5 pupils appear.

- If the numbers into reception and Y7 do not materialise in subsequent years, the funding may cease.
- For bulge years there will be a first-year funding guarantee as detailed above.
- Once the LA has received the APT data from the ESFA (usually mid-December), maintained eligible schools will receive growth fund ( $7/12\text{ths}$ ) as a lump sum in the January SOF payment, academies will receive two payments  $7/12^{\text{th}}$  in January SOF payment and  $5/12^{\text{th}}$  in the summer term (usually June).

#### 4. Exceptional Circumstances

- In exceptional situations there may be a tailored approach specific to the needs of the school; for example, a school facing growth across a number of year groups arising from housing developments, where the approaches above would not be appropriate. In these exceptional circumstances it may be appropriate for a growing school to be funded via estimated pupil numbers through the APT
- new and growing schools: it may be appropriate for a new and growing school to be funded via estimated pupil numbers through the APT
- In exceptional situations, additional funding may be provided towards start-up costs outside of the agreed growth fund formula.
- in exceptional circumstances, where a school needs to admit a pupil into a key stage 1 class for a reason other than as an 'excepted pupil' under the school admissions code, additional funding will be made available, if necessary, to enable the school to take relevant measures to comply with the infant class size regulations. The funding will be a minimum of  $7/12 \times 12.5 \times \text{AWPU}$ , for the period September to March for maintained schools, and September to August for academies.
- In exceptional circumstances where provision is on a different (not previously existing site) split site funding will be considered.

#### 5. Allocation of Growth Fund and Under and Overspends of the fund.

- Schools Forum will approve the Growth Fund on an annual basis based upon the growth (permanent and bulge) approved by the Local Authority and justified by the pupil planning places information.
- Any under or overspend on growth funding will be carried forward to the following funding period or if appropriate returned to be allocated to schools via the funding formula.

**Growth Fund  
Summary**

as at  
2014/15

<b>School</b>	<b>2014/15</b>	<b>2015/16</b>	<b>2016/17</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>Notes</b>
	100,600.31	78,433.65	65,600.31	65,600.31	65,600.31	65,600.31	65,600.31	7/12ths 1 form entry from Sept 14, year 1 includes start up costs of £35k, year 2 includes 7/12ths Split Site
Savile Park Primary School	55,521.77	95,180.18	95,180.18	95,180.18	95,180.18	95,180.18	95,180.18	7/12ths 1 form entry from Sept 14, year 1 includes start up costs of £35k. Year 2 onwards is full year cost due to Academy status
Siddal Primary School	25,011.25	25,011.25	25,011.25	25,011.25	25,011.25			7/12ths 1/2 form of entry from Sept 12 (previous funding paid through contingency)
Ripponden J & I School								
<b>Total Annual Cost</b>	<b>181,133.33</b>	<b>198,625.08</b>	<b>185,791.74</b>	<b>185,791.74</b>	<b>185,791.74</b>	<b>160,780.49</b>	<b>160,780.49</b>	
Budget	<b>150,000.00</b>	<b>150,000.00</b>	<b>210,000.00</b>	<b>185,000.00</b>	<b>185,000.00</b>	<b>160,000.00</b>	<b>160,000.00</b>	
overpsend	<b>-31,133.33</b>	<b>-48,625.08</b>	<b>24,208.26</b>	<b>-791.74</b>	<b>-791.74</b>	<b>-780.49</b>	<b>-780.49</b>	
Cummulative overspend	-31,133.33	-79,758.41	4,449.85	3,658.11	2,866.37	2,085.88	1,305.39	
Increased contribution		60,000.00						
<b>Projected under/overspend</b>	<b>-31,133</b>	<b>-19,758</b>	<b>4,450</b>	<b>3,658</b>	<b>2,866</b>	<b>2,086</b>	<b>1,305</b>	

N.B.



All calculations based on OCT 13 PLASC data and will be subject to change

## Growth Fund Summary

as at 1st Sept  
2016

School	Actual 2014/15	Actual 2015/16	Actual 2021/22	Estimate 2022/23	Estimate 2023/24
Copley			30,492	28,190	29,702
Calder Learning Trust			91,327	79,485	
Rastrick Academy			274,750	251,110	85,163
Trinity Grammar			162,927	195,862	56,775
Trinity Academy Halifax			168,827	152,369	
Brooksbank			76,351	73,171	70,263
Ryburn			257,387	217,411	210,789
<b>Total Annual Cost</b>	<b>146,133</b>	<b>168,658</b>	<b>1,062,061</b>	<b>997,596</b>	<b>452,692</b>
Budget	<b>150,000</b>	<b>210,000</b>	<b>500,000</b>	<b>580,586</b>	<b>23,000</b>
refund from EFA re Academy Schools			306,387	452,754	255,488
overspend/underspend	3,867	41,342	-255,674	35,744	-174,204
Projected Cumulative overspend	3,867	45,208	<b>139,326</b>	<b>175,069</b>	<b>865</b>

N.B.

All estimated calculations based 2022-23 Formula  
Pupils numbers provided by Capital and Access Team and will be subject to change

# Report to Schools Forum

<b>Meeting Date</b>	1 December 2022
<b>Subject</b>	Falling Rolls Fund
<b>Report Author</b>	Jane Davy

<b>Report purpose</b>
To provide members of Schools Forum with report on the amount of Falling Rolls fund expended in 22/23 and the amount to be retained from the growth fund element of the schools block DSG for 2023-2024.

<b>Need for Decision</b>
For School Forum to agree the amount to be retained for the Falling Rolls Fund.

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

# Report to Schools Forum

## 1. Background information and context

LA officers presented a report at the November School Forum meeting in respect of setting up a falling rolls fund from April 2022.

School Forum agreed to retain all of the growth fund allocated to the Schools Block in 2022/23 to fund Growth Fund and Falling Rolls Fund.

## 2. Main issues for Schools Forum

### Need for consideration

- a) LA officers have used this data from the Oct 22 census to calculate the amount required to fund the 2022/23 Falling Rolls. Data has been provided by the LA's Schools Organisation and Planning section in September 22 which has been used to estimate the requirement of funds needed for the falling rolls.
- b) Based on the preliminary data 10 primary schools meet the criteria 1-5 in the agreed criteria listed in Appendix A, 4 primary schools are projecting to have balances less than £60k (criteria 6) as at 31<sup>st</sup> August 22 (academies) or 31 March 23 (maintained schools), 2 primary school's are just above the £60k balance and may be eligible, the remaining 4 schools all have forecasted balances considerably over £60k and it is unlikely they will qualify for funding. This data will be further assessed in the summer term upon receipt of their year end accounts in April 2023. Academies will be assessed on their accounts as at the 31<sup>st</sup> August 2022. Schools who are above the minimum amount of agreed surplus balances may be eligible to qualify if they can provide evidence that the balances as at 31 August 2022 or 31 March 2022 include unspent ring fenced grants.
- c) Based on the above it is estimated that £154k will be required to fund falling rolls, this will be funded from the Schools Block DSG Growth Fund. A summary of the estimated expenditure is shown below. A further report with more up to date pupil numbers will be brought to Schools Forum in January 2023. All eligible schools will trigger a review with the LA to discuss the options available.

School Name	Actual Expenditure 2022/23 £	Estimated Expenditure 2023/24
Cornholme	0	43,139
Christ Church Junior School	24,163	36,774
Christ Church Pellon	0	26,166
Heptonstall J, I & N School	23,246	0
Tuel Lane Infant School	37,629	12,425
Old Town Primary School	12,417	27,227*
Norland	0	14,498*
<b>Total</b>	<b>97,455</b>	<b>160,229</b>
Surplus brought Forward	0	6,545
Budget	104,000	153684
<b>Surplus to carry forward to 23/24</b>	<b>6,545</b>	<b>0</b>

\*Schools currently marginally above the £60k balance threshold, if this is still the case in April 23 they will not be eligible for funding.

### 3. Recommendations

- a) Schools Forum notes the actual falling rolls expenditure for 2022/23
- b) Schools Forum notes the estimated falling rolls expenditure for 2023/24
- c) Schools Forum note falling rolls is funded from the growth fund discussed in the previous paper.

### 4. Reasons for recommendations

- a) The LA should report the expenditure and balance of Falling Rolls Fund in accordance with the School Finance Regulations to schools forum.
- b) As falling rolls is funded within the schools block, a movement of funding from the schools formula into the falling rolls fund would not be treated as a transfer between blocks. The schools forum still needs to agree the total falling rolls fund

### 5. Impact of funding, targets and milestones

Falling Rolls Fund supports schools and academies with falling pre-16 pupils numbers to maintain a good or outstanding quality of education until pupil numbers recover or whilst undergoing a restructure. All eligible schools will trigger a review by the LA in partnership with the schools governing body (maintained) or school resource management advisers (academies).

## **6. Resource implications**

Funding should be met from the 2023/24 schools block allocation.

Funding for falling rolls cannot be met from any other sources of funding. Therefore, if funding is not retained from the schools block, schools will not receive any funding to support the school to maintain standards until either pupil numbers recover or a restructure has taken place.

### Falling Rolls Fund

Falling Rolls is funded from the schools block allocation for Growth Funding. The Falling Rolls Fund Criteria and the amount allocated is agreed by the Schools Forum.

#### Falling rolls fund criteria and method of allocation.

1. The school must have been judged good or outstanding at their last Ofsted inspection. In exceptional circumstances a dispensation will be sought for schools judged as RI.
2. Only schools with fewer than 420 pupils will be considered for the falling rolls fund.
3. Schools receiving growth funding are excluded.
4. Between the October census two years prior to the latest census the total NOR (for the whole school) has dropped by at least 10% and the number of pupils admitted to reception or year 7 by at least 20% of the PAN.
5. The drop in NOR is not a result of a bulge class leaving the school.
6. Balances held by the school, Academy or MAT at the last year-end must be less than £60k excluding ring fenced grants (Example PE and Sports Grant Premium, Cluster Income).
7. Local planning data shows the places (at the school) will be required within the next 3 years.  
Funding will normally be available for a maximum of 3 years, provided that pupil numbers do not recover in the meantime.

OR

8. The school will require funding to continue to provide pupil places in the short term, maintain a good or outstanding quality of education whilst undergoing a restructure due to an anticipated fall in school rolls. Funding is available for a maximum of a year for a single establishment restructure or up to a maximum of three years for multi establishment restructures.
9. Schools eligible for funding will trigger a review by the Local Authority in partnership with the schools governing body (maintained) or school resource management advisers (SRMA) (Academies). The academy will be required to report to the LA.
10. If schools/academies meet the above criteria they will be allocated funding based on the basic entitlement (AWPU) for the vacant places below 85% of PAN for the whole school - See point 7 & 8 above for the duration of funding) The minimum funding guarantee (MFG) and sparsity funding will be deducted from the additional funding.

# Report to Schools Forum

<b>Meeting Date</b>	1 December 2022
<b>Subject</b>	School Balances – Autumn Monitor
<b>Report Author</b>	Jane Davy

<b>Report purpose</b>
To provide Schools Forum with the latest financial projections for maintained schools for the financial year 2022/23

<b>Need for consideration</b>
Schools Forum to note the current position.

<b>Need for decision</b>
N/A

<b>Contact Officers</b>
<p>Jane Davy-LMS Finance Manager  <a href="mailto:Jane.davy@calderdale.gov.uk">Jane.davy@calderdale.gov.uk</a>            01422 393543</p>

## **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.
- b) This report covers Calderdale's 53 maintained schools (1 through school, 1 secondary, 48 primary and 3 special Schools) and excludes academies.
- c) Schools Forum agreed to suspend the clawback mechanism for the financial year 2022/2023. Therefore, this report is for information only.

### **2. Main issues for Schools Forum**

- a) At the end of the 2021/22 financial year, total school balances in Calderdale (excluding academies) were £9.5 million: primary schools £6.7 million, secondary schools £1.1 million and special schools £1.7 million.
- b) In setting their 2022/23 school budgets, maintained primary schools planned to reduce their balances by the end of the financial year to £5.1 million, maintained secondary schools planned to both have balances of £1.6 million, and special schools planned to have balances of £1.2 million. This would give total planned balances of £7.9 million.
- c) The Autumn term monitor shows maintained primary schools are projecting to have balances at the end of the year of £3.58 million, maintained secondary schools are projecting surplus balances totalling £1.64 million and special schools are projecting £1.03 million. This would give total projected balances of £6.25 million at the end of March 2023.
- d) At the June School Forum meeting it was agreed to suspend the balance control mechanism for 22/23 and to adjust the calculation of the recommended thresholds to be a balance above 20% of all Income, this would bring maintained schools reporting in line with the ESFA requirements for academies.
- e) Using the new threshold calculation 1 primary school is projecting balances for 2022/23 above the recommended threshold. 4 of the schools were above recommended thresholds at the end of the 2021/22 financial year.
- f) 4 Primary Schools are forecasting to be in deficit by 31 March 23, a combined total of £214k and 5 primary schools are projecting balances less than £20k.
- g) Overall balances increased during 2021/22 and based on autumn term monitors schools are forecasting a decrease in balances during 2022/23 and against planned budgets.
- h) This financial year has seen increased pressures on school budgets with pay awards being higher than expected inflation and the energy crisis. Although the



majority of maintained schools will be in surplus by March 2023 if schools in year expenditure follows the same trend as 22/23 and no further funding is forthcoming it is forecasted that 27 schools will be in deficit by March 2024.

i) A summary of schools balances is shown in Appendix A.

### **3. Recommendations**

- The current projections provided by schools are noted.
- A further update is provided in April 2023 based on spring term projections.

### **4. Reasons for recommendations**

To enable Forum to give a view on maintained school balances.

### **5. Impact of funding, targets and milestones**

No impact unless clawback mechanism is implemented.

### **6. Resource implications**

No Impact unless clawback mechanism is implemented

## 7) Appendices

## Appendix A

### Calderdale Schools - Budget Monitoring 2022/23

Code	School Name	Surplus bfwd	Budgeted Income	Original Budget 2022/23			Autumn Term Monitoring	
		2022/23	2022/23	In-year deficit or surplus	Original forecast	Year End Balances	Revised forecast	Year End Balances
		£	£	£	£	%	£	%
	PRIMARY SCHOOLS		Total					
6402	All Saints' CE (VA) J & I School	123,215	1,154,651.00	-28,448.00	94,766.52	8.21%	82,291.99	7.13%
6436	Ash Green Primary School	267,785	3,070,150.00	-81,540.00	186,245.00	6.07%	110,875.00	3.61%
6202	Bailiffe Bridge J & I School	117,149	991,426.00	-12,512.00	104,637.00	10.55%	78,586.84	7.90%
6203	Barkisland CE (VA) Primary School	61,127	1,002,997.00	-21,922.00	39,205.00	3.91%	11,491.00	1.15%
6407	Carr Green J, I & N School	-11,760	1,823,630.00	-93,355.00	-105,114.73	-5.76%	-114,202.00	-6.26%
6408	Castle Hill J & I School	202,426	1,199,306.00	-45,194.00	157,232.00	13.11%	86,261.47	7.19%
6207	Central Street Infant & Nursery School	148,585	545,505.00	-16,933.00	131,652.30	24.13%	75,114.00	13.77%
6409	Christ Church (Pellon) CE (VC) Primary School	82,608	1,275,295.00	-70,821.00	11,787.41	0.92%	-77,544.42	-6.08%
6208	Christ Church CE (VA) Junior School (Sowerby Bridge)	28,455	822,193.00	6,516.00	34,971.11	4.25%	-14,996.87	-1.82%
6209	Cliffe Hill Community Primary School	56,762	1,441,460.00	-23,240.00	33,521.74	2.33%	11,613.00	0.81%
6210	Colden J & I School	7,333	567,036.00	14,383.00	21,715.57	3.83%	23,085.10	4.07%
6211	Copley Primary School	195,420	1,542,231.00	29,616.00	225,036.27	14.59%	231,625.00	15.02%
6212	Cornholme J, I & N School	92,335	1,148,472.00	-11,843.00	80,491.79	7.01%	34,886.43	3.04%
6410	Cross Lane Primary & Nursery School	146,430	1,938,133.00	-28,922.00	117,508.22	6.06%	71,752.00	3.70%
6411	Elland CE (VA) J, I & N School	191,671	1,192,587.00	-28,230.00	163,440.92	13.70%	210,246.00	17.63%
6412	Ferney Lee Primary School	122,441	1,392,013.00	30,316.00	152,756.82	10.97%	131,453.17	9.44%
6217	Hebden Royd CE (VA) Primary School	83,592	565,407.00	-24,460.00	59,132.08	10.46%	57,723.25	10.21%
6218	Heptonstall J, I & N School	38,783	506,318.00	2,380.00	41,163.33	8.13%	17,121.74	3.38%

6221	Holywell Green Primary School	82,789	1,106,720.00	-62,273.00	20,516.33	1.85%	23,378.24	2.11%
6416	Lee Mount Primary School	81,783	2,064,091.00	-12,616.00	69,167.31	3.35%	34,788.71	1.69%
6418	Ling Bob J, I & N School	269,575	2,228,624.00	-35,871.00	233,703.86	10.49%	155,044.00	6.96%
6419	Longroyde Junior School	56,823	2,074,052.00	8,289.00	65,111.82	3.14%	6,998.32	0.34%
6263	Luddenden CE School	138,264	811,846.00	-50,734.00	87,530.04	10.78%	91,205.78	11.23%
6226	Midgley School	164,481	557,960.00	-38,905.00	125,576.19	22.51%	134,933.84	24.18%
6442	Moorside Community Primary School	257,211	1,597,716.00	-106,725.00	150,485.67	9.42%	99,444.77	6.22%
6230	New Road Primary School	189,126	970,245.00	-32,257.00	156,868.84	16.17%	158,315.26	16.32%
6232	Norland CE (VC) J & I School	137,037	565,136.00	-30,075.00	106,961.57	18.93%	66,503.53	11.77%
6420	Northowram Primary School	200,988	2,262,814.00	-86,459.00	114,529.29	5.06%	134,291.98	5.93%
6233	Old Town Primary School	63,582	558,341.00	665.00	64,246.82	11.51%	62,367.00	11.17%
6422	Parkinson Lane Community Primary School	764,743	3,277,421.00	-284,962.00	479,780.79	14.64%	343,117.00	10.47%
6234	Ripponden J & I School	149,848	1,137,924.00	-7,647.00	142,201.00	12.50%	88,619.00	7.79%
6425	Riverside Junior School	231,147	926,806.00	-16,730.00	214,417.47	23.14%	50,000.00	5.39%
6247	Salterhebble J & I School	45,011	1,148,268.00	-16,026.00	28,985.30	2.52%	14,263.59	1.24%
6414	Savile Park Primary School	283,313	2,794,675.00	-19,644.00	263,669.28	9.43%	250,267.34	8.96%
6250	Shade Primary School	39,934	1,115,743.00	392.00	40,325.53	3.61%	29,438.91	2.64%
6430	Shelf J & I School	47,380	1,313,265.00	-783.00	46,597.17	3.55%	32,230.78	2.45%
6236	St Andrew's CE (VA) Infant School (Brighouse)	94,987	943,869.00	-25,663.00	69,323.96	7.34%	40,347.00	4.27%
6426	St Andrew's CE (VA) Junior School (Brighouse)	142,071	1,289,240.00	-26,372.00	115,698.56	8.97%	50,062.00	3.88%
6242	St Mary's CE (VC) J & I School (Sowerby Bridge)	128,313	555,892.00	-39,782.00	88,531.35	15.93%	75,908.39	13.66%
6243	St Michael & All Angels CE Primary School	56,131	1,127,185.00	-2,342.00	53,789.07	4.77%	22,278.32	1.98%
6255	Stubbings Infant School	107,401	329,486.00	-9,738.00	97,662.90	29.64%	31,144.00	9.45%
6431	Todmorden CE (VA) J & I School	224,989	1,437,508.00	-29,593.00	195,396.29	13.59%	192,278.81	13.38%
6256	Triangle CE (VC) Primary School	126,587	1,059,756.00	-48,266.00	78,320.80	7.39%	61,430.65	5.80%
6257	Tuel Lane Infant School	33,850	599,700.00	-25,559.00	8,290.67	1.38%	-7,416.50	-1.24%
6443	Walsden St Peter's CE (VC) Primary School	174,053	908,745.00	-63,825.00	110,227.50	12.13%	125,000.00	13.76%
6261	Warley Town School	63,576	770,262.00	11,647.00	75,222.78	9.77%	37,092.00	4.82%
6253	Withinfields Primary School	89,933	1,877,500.00	-24,066.00	65,866.82	3.51%	32,664.22	1.74%
6433	Woodhouse Primary School	218,017	2,083,063.00	-57,716.00	160,301.46	7.70%	117,995.00	5.66%

	<b>TOTAL PRIMARY SCHOOLS</b>	6,617,299.79	61,672,663.00	- <b>1,537,845.00</b>	5,079,454.79	8.24%	3,581,374.64	5.81%
						4		<b>1</b>

Code	School Name		Funding  2022/23 SBS, PP & TPG	Original Budget 2022/23			Autumn Term Monitoring	
				In-year deficit or surplus £	Year end balances		Year end balances	
					£	%	£	%
	<b>SECONDARY SCHOOLS</b>							
6603	CALDER HIGH SCHOOL	952,621	8,722,904.00	261,735.00	1,214,355.62	13.92%	1,197,911.00	13.73%
6616	TODMORDEN HIGH SCHOOL	229,481	6,045,508.00	201,923.00	431,404.00	7.14%	438,762.78	7.26%
	<b>TOTAL SECONDARY SCHOOLS</b>	1,182,101.62	14,768,412.00	463,658.00	1,645,759.62	11.14%	1,636,673.78	11.08%
						0.00%		<b>0</b>

Code	School Name		Funding  2022/23 SBS, PP & TPG	Original Budget 2022/23			Autumn Term Monitoring	
				In-year deficit or surplus £	Year end balances		Year end balances	
					£	%	£	%
	<b>SPECIAL SCHOOLS</b>							
6802	HIGHBURY SCHOOL	417,747	2,706,995.00	-172,228.00	245,518.90	9.07%	184,898.00	6.83%
6800	RAVENSCLIFFE HIGH SCHOOL	529,095	5,593,363.00	179,803.00	708,897.80	12.67%	558,374.00	9.98%
6803	WOODBANK SCHOOL	753,370	2,796,125.00	-496,643.00	256,726.95	9.18%	289,020.00	10.34%
	<b>TOTAL SPECIAL SCHOOLS</b>	<b>1,700,211.65</b>	11,096,483.00	-489,068.00	1,211,143.65	10.91%	1,032,292.00	9.30%
						<b>0</b>		<b>0</b>

	<b>TOTAL ALL SCHOOLS</b>	<b>9,499,613.06</b>	<b>87,537,558.00</b>	- <b>1,563,255.00</b>	<b>7,936,358.06</b>	<b>9.07%</b>	<b>6,250,340.42</b>	<b>7.14%</b>
						<b>4</b>		<b>1</b>

# Report to Schools Forum

<b>Meeting Date</b>	1 December 2022
<b>Subject</b>	School Capital Funding and Spend
<b>Report Author</b>	Richard Morse

<b>Report purpose</b>
To provide information on how the Local Authority is funded to maintain community schools and meet the need for additional school places.

<b>Need for consideration</b>
For Information Only

<b>Need for decision</b>
Not Applicable

<b>Contact Officers</b>
Richard Morse School Organisation and Access Manager Education and Inclusion Children and Young People's Services Telephone: 01422 392501 E-mail: <a href="mailto:richard.morse@calderdale.gov.uk">richard.morse@calderdale.gov.uk</a>

## **Report to Schools Forum**

### **1. Background information and context**

#### **Maintenance**

The responsibility for maintaining community school land and buildings is shared between the Local Authority and Schools themselves. The main funding streams available are School revenue budgets, Devolved Formula Capital (DFC) and School Condition Allocations (SCA).

Schools have a responsibility to manage their buildings on a day to day basis, general maintenance, lifecycle replacement, clearing gutters, painting woodwork, patching leaky roofs etc., however there comes a point where it is beyond an individual schools means to address works of a major nature and the Local Authority will use their funding when this point is reached.

In normal circumstances a school will be asked to contribute 10% towards any maintenance scheme funded by the Local Authority.

#### **Basic Need**

Basic Need funding is allocated to the LA to enable the Authority to meet its statutory obligations around ensuring that there is enough suitable school place provision to meet need. Historically one funding stream has been allocated to fund both Mainstream and Special provision however in the last two years a separate funding stream has been allocated to address Special Needs.

This recognises the significant difference in per pupil costings to commission specialist provision versus mainstream.

Basic Need funding is intended for wherever it is needed and is not limited to community schools.

In certain circumstances the LA is also able to seek contributions from housing developers to support a funding solution to identified shortages in school place provision. Opportunities to secure any significant funding here have been extremely limited and have historically provided comparatively little funding.

The Authority is in the process of adopting the 'Local Plan' setting out its new housing strategy and the number of homes that will be delivered will be significant.

The amount allocated to Local Authorities is determined by an annual return to the DFE (SCAP) which advises the department of projected pupil numbers and current capacity. The return incorporates projected additional demand from new housing under construction but does not for example allow for the inclusion of longer-term projection arising from new homes identified in the Authority's Local Plan.

## **2. Capital Spend**

### **Maintenance**

Some of the most recent or current LA funded projects include: Moorside Primary - Asbestos Removal & Demolition, Calder High - Asbestos Management, AMP Surveys, AM Surveys, Walsden St Peter's - Asbestos removal & Structural Issues, Ripponden J&I - Flat Roof & Boiler replacement, Woodhouse - Essential condition/H&S works (Full roof replacement), Shade Primary - Essential condition/H&S Works.

Following the commission of Asset Management reports for the maintained school estate, works to the value of £23.3m have been identified with a recommendation that these are carried out within 1-5 years – construction inflation plus associated costs for surveys and asbestos removal prior to any works could see this figure total in excess of £34m.

The last 3 years capital maintenance allocations have been: 20/21 - £1,834,839, 21/22 - £1,752,572 and 22/23 - £1,859,798.

The funding is clearly not sufficient to address all of the condition needs identified within the recently commissioned asset management reports and therefore priority is being afforded to those areas which pose a health and safety risk or which might result in closure of a school (e.g. imminent failure of heating or electrical systems etc).

Officers are working through the recently commissioned plans to identifying greater and more imminent risks in order to prioritise such works.

### **Basic Need**

More recent projects here include: Luddenden Youth Centre (SEN) – Conversion into additional capacity for Primary Special Needs, Ravenscliffe High School – additional capacity Secondary Special Needs (Skircoat), Highbury – small expansion/reorganisation of space to provide additional capacity, Ryburn High - 11-16 Expansion, Trinity @ SB - 11-16 Expansion and Brooksbank High - 11-16 Expansion.

Basic need is the term used to describe the need for additional pupil places – not to be confused with any allocation for maintaining the school estate. The DfE collate data on how the Local Authority has spent its Basic Needs funding and authorities are scored on this (RAG rated). This is to ensure that money intended to create additional school places is not diverted into addressing maintenance issues (although where there is scope to do so, schemes can be commissioned with a mix of Capital Maintenance and Basic Need funding - where it is possible to carry out an expansion and refurbishment programme for example).

In addition to the recent works outlined above, feasibility studies are underway to create additional ASD capacity at Rastrick Academy and an expansion of provision at Ravenscliffe Sith Form site.

The Local Authority has a statutory duty to ensure that there is a sufficient number of appropriate places available in schools across the borough and needs to target funding carefully.

The last 3 years of basic need funding have been: 20/21 - £4,145,886, 21/22 - £3,230,957, 22/23 - £6,205,288 and for 23/24 will be £2,142,115.

In addition to this a separate funding stream for special provision is now provided 20/21 - £551,746, 21/22 - £2,442,163 and 22/23 - £1,701,036.

It is anticipated that once all current and identified projects are completed a basic need balance of £15,643,894 and £1,670,909 (special) will be available to address remaining issues.

The Authority's Local Plan brings an added complication to determining where additional places are required (and how they are funded). Whilst DfE funding streams and the pupil projections detailed within the Authority's School place Planning document serve a purpose of identifying and addressing immediate and imminent need, the Local Plan illustrates the need for longer term thinking. Decision makers need to bring together the two sets of data in order to effectively plan for additional pupil place need.

Solutions here will potentially use a combination of funding (some Basic Need and some developer contributions). Developer contributions cannot be relied upon in all circumstances (e.g. for social housing there may be a limited developer contribution or sometimes none, regardless of whether an additional demand for pupil places results). Imposing developer contributions in some circumstances can make developments unviable and so cases have to be taken on individual merit.

### **3. Current and Projected Pressures**

#### **Primary**



Generally pupil numbers for Primary are in decline. These have fallen from in excess of 19000 to below a projected number of 17000 by 2025. There would be no additional need for places except that when the Local Plan is factored in, projected additional need arising from new housing more than offsets any surplus in South East Calderdale. Consequently, two new schools are required (located within the two new garden suburbs) to accommodate additional demand. These sites are adjacent to areas identified for significant in neighbouring Kirklees and whilst not the primary factor to be considered this needs to be taken into account. The size of these new builds will need to be reviewed to take into account the latest projections for need at the time of commission. It is anticipated that these will be funded through developer contributions.

## **Secondary**

Overall numbers in Secondary are starting to fall following a recent peak in pupil numbers. This is likely to continue to broadly follow the trend seen in Primary. South East Calderdale is again an issue due to the new homes in the vicinity. Originally this would have been addressed through a government funded Free School in the area, however a combination of falling numbers, a change in parental preferencing patterns and delays to the adoption of the Local Plan have brought into question whether a whole new school is required or whether additional capacity might be delivered through smaller expansions of existing provision in the area. There is also an argument that surplus in schools further afield should be utilised before any expansion takes place and a view which balances the interest of all providers will need to be reached. Questions such as 'how far is too far to travel' for pupils will need to be addressed.

Developer contributions are not likely to cover the cost of both Primary and Secondary expansion in this part of the Borough and so some call upon the Basic Need pot is likely to occur if work is commissioned here.

## **Alternative Provision and Special Provision**

Pressures on the existing provision are evident. A small expansion of the Ravenscliffe (Spring Hall) site is being commissioned and an ASD unit developed at Rastrick Academy.

An expression of interest for an all-through special Free School has been submitted which if successful will see an investment of around £20m to address basic need pressures in this area. Failing this, a local solution will have to be found.

AP is also an area where pressures are evident, and work is currently underway to identify possible facilities that could accommodate pupils who would benefit from preventative/intervention support. An expression of interest has also been submitted for a Calderdale AP Free school and this, again, would provide support for pupils requiring intervention due to lack of engagement and/or challenging behaviour in school.

## **4. Associated Developments**

The scale of need identified in the latest condition reports is such that it is not going to be fully addressed through the current funding provided. Officers therefore look for opportunities to bid for funding when opportunities are made available.

Early summer 22 saw the next round of the School Rebuilding Programme opened to identify the worst 500 schools nationally. Officers took the opportunity to submit bids for 14 of our worst condition schools (12 Primary and 2 Secondary).

## **5. Conclusion**

There are a number of significant factors that will influence decisions on the future allocation of both Capital Maintenance and Basic Need funding. The outcome of the School Rebuilding Programme and review of current condition reports will influence and inform condition spend.

The outcome of the Free School proposal in SE Calderdale will influence potential spend of Basic Need and Developer Contributions in this part of the Borough.

The outcome of the Special Free School bid will determine what action is required in the event that this bid is unsuccessful.

All of these factors will determine what funding remains for the LA to achieve its objectives around meeting sufficiency of places and the safe learning environments for pupils and school staff.

It is anticipated that an informed strategy around future spending across these areas will develop and emerge towards the summer of 2023, with perhaps some necessary interim measures being introduced where decisions are delayed or deferred.

## ***Item 15***



# **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
<b>1 December 2022</b>	Virtual	Elect Co-Vice Chairs – Ian Hughes	Decision	14 November 2022
		Forum Constitution and Terms of Office– Ian Hughes/Tony Guise – verbal	Decision	
		Allocation of funding to school improvement clusters – half yearly impact report – Paul Tinsley/Connie Beirne/Jane Davy	Information	
		Reforming how Local Authority school improvement functions are funded – Connie Beirne	Information	
		Pupil Planning document – Richard Morse	Information	
		School funding update report – Jane Davy	View/Consultation	
		Growth Fund report – Jane Davy	Decision	
		Falling Rolls report – Jane Davy	Decision	
		Update on maintained schools balances – Jane Davy	View/Information	
		Capital Maintenance Briefing paper – Richard Morse	Information	
		Work programme	Information	
<b>12 January 2023</b>	Virtual	Early years block provision, central spend – Martyn Sharples	Consultation/Decision	19 December 2022
		Schools funding update – Jane Davy	Consultation	

Meeting date	Venue	Reports		Deadline for papers
		Falling Rolls – Jane Davy	Decision	
		Growth funding 2021/22 and 2022/23 – Jane Davy	Decision	
		Claw Back Mechanism – dependent on June Meeting – Jane Davy	Decision	
		Review of services to schools – Michael Holgate	Decision	
		De delegation of School improvement functions – Paul Tinsley/Connie Beirne	Decision	
		Allocation of 2022/23 Central Service Schools block (CSSB) central spend – Paul Tinsley/Steve Drake/Michael Holgate	Decision	
		De-delegation including Union facilities – Michael Benn/Jane Davy to present	Decision	
<b>27 April 2023</b>	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	

Meeting date	Venue	Reports		Deadline for papers
<b>22 June 2023</b>	Virtual Meeting	Scheme for Financing Schools and National Funding Formula – Jane Davy - TBC	Decision/Information/Discussion	17 June 2023
		Final Balances and 3-year Budget Plans – Jane Davy	Information	
		Claw Back Report – Jane Davy	Discussion/Decision	
		Work programme	Information	