

Schools Forum

Date: 22 June 2023

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)
(Co-Vice Chair)

Primary Governors Maintained x 2

Adam McNicholl (Hebden Royd Primary School)

Mary Carrigan (Castle Hill Primary School)

Secondary Head Maintained x 1

Tony Guise (Calder High School) (Chair)

Secondary Head Teacher Substitute

Vacant

Secondary Governor Maintained x 1

Gill Shirt (Todmorden High School)

Special School Representative x 1

Debbie Sweet (Highbury School)

Academy Members x 10

Karen Morley (Scout Road Academy)
(Co-Vice Chair)

John Eccleston (Warley Road Primary Academy)

Desmond Deehan (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

Gillian Poole (National Education Union)

Staff Unions

Post 16 Representative

Karl Veltman (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 23rd February 2023**
5. **Allocation of Funding to School Improvement Clusters (mid-term updates)**
Information
Connie Beirne
6. **Scheme for Financing Schools and National Funding Formula**
Information
Jane Davy
7. **Final Balances and 3-year Budget Plans report**
Information
Jane Davy
8. **Claw Back Report**
Discussion / Decision
Jane Davy
9. **LA initial report on proposal to move 0.5% from schools block to High Needs Block report**
Discussion
Jane Davy/David Graham
10. **Forum Constitution and Terms of Office**
Information
Ian Hughes
11. **Self-Assessment Feedback**
Discussion
Ian Hughes
12. **Changes to Early Years Funding in 23/24 and future provision – report**
Information/Discussion/Decision
Martyn Sharples

- 13. Addendum to the Admissions and Schools Rebuilding Programme; outlining what each new role will cost** **Richard Morse**
Information
- 14. National Funding Formula and falling rolls – initial feedback and verbal update** **Jane Davy**
Information
- 15. Any Other Business** **Chair**
Questions to be submitted a **minimum** 3 days prior to the meeting in writing to:
CalderdaleSchoolsForum@calderdale.gov.uk
Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair.
- 16. Future Dates** **Paul Tinsley**

19 October 2023
25 January 2024
25 April 2024

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

CALDERDALE SCHOOLS FORUM

23 February 2023 – Virtual Meeting Via Teams

PRESENT:

Tony Guise (Secondary Maintained) – Chair
Brenda Monteith (Roman Catholic)
John Eccleston (Academy)
Karen Morley (Academy) – Co Vice Chair
Mungo Shepherd (Primary Maintained)
Phil Hannah (PRU)
Jo Buckley (Primary Maintained) – Co Vice Chair
Julie Kendall (Academy)
Adam McNichol (Primary Governors Maintained)
Desmond Deehan (Academy)

IN ATTENDANCE:

Paul Tinsley (AD Education and Inclusion)
Richard Morse (Senior Commissioning Officer – School Organisation and Planning)
Jane Davy (Finance Officer)
Connie Beirne (Interim Service Manager for Early Years and School Strategy and Performance)
Martyn Sharples (Finance Officer)
Michael Holgate (Account Manager)
David Graham (QA and Complaints Consultant)
Alex Webley (Head of SEND)
Steve Drake (Finance Officer)
Julie Jenkins (Director CYP) observing

APOLOGIES

Ian Hughes (Legal Officer)
Mary Carrigan (Primary Governors Maintained)
Gill Poole (Unions)
Dan Burns (Academy Primary)

1. Substitutes nominated for this meeting and apologies for absence

None.

2. Members Interests

Jo Buckley declared an interest item 7, as she is an Associate for the School Effectiveness Team.

John Eccleston declared an interest, as he sits on the Partnership Board and is part of the Calderdale Governors Association.

Brenda Monteith declared an interest, as she is Governor at Highbury School.

3. Admission of the Public

None.

4. Minutes of the Schools Forum held on 12 January 2023

AOB: Members asked what are the implications if maintained schools are forced to hold a deficit? Jane Davy is writing a report to go to Julie Jenkins, Director CYP, Isabel Brittain, Interim Chief Finance Officer and Elected Members hoping for a decision on a way forward. Jane should have this prepared by the end of next week. Jane and Local Authority Officers to keep Schools Forum informed.

Minutes agreed.

5. Admissions and School Rebuilding Programme

To note, Schools Forum Members cannot identify where funding for posts will come from, they can just approve the posts.

Q: with regards to the School Rebuilding, Asset Management and Fair Access Officer roles, can the roles be amalgamated in some way? Yes, proposed roles have already been combined where there is a natural fit.

Q: will the funding for rebuilding 9 schools mean there is more in the pot for other schools not identified in this rebuilding scheme? Yes, as the 9 schools were in some of the worst conditions, funds what would have needed to be spent on those schools can be used on the remaining schools.

Q: does the rebuilding funding cover a project management post? No, the DfE will procure buildings, but it will not purchase extra land, nor will it pay for officer time.

Q: can the posts be funded via LA funds and can we clarify the total costs of roles? At this time the roles have still to be graded, therefore no firm figures are available, but have been estimated by looking at similar roles within the Council.

Q: if funding is come from Central Services Block, what impact will there be on school budgets? We need to consider the implications of taking 150K out of schools budgets.

Q: if the LA are looking to use the balance of the landlord budget (whatever is left from the £87000 – about £60,500), added to the Education Welfare Service 75K underspend, there would be much less to find.

Q: has the 6K PFI funding from schools been included? Do we need a consultant, rather than a PFI Officer who will not have the required speciality knowledge? The proposal is for a combined role. Someone with the required facilities management understanding, combined with the experience of someone who can commission condition reports; and have an understanding of the Legal perspective and is able to liaise with HR and Legal colleagues over issues such as TUPE. Also to support schools with asset management of current building stock.

Schools Forum Members are in agreement with the need for these roles.

Schools Forum Members requested an additional report on what each post will cost at the next Schools Forum Meeting.

6. Delegation of school improvement functions – addendum

The Chair recognised the work that has gone into answering all the questions raised at the last Schools Forum Meeting and thanked Connie for her work on pulling together the addendum.

Connie has benchmarked what other regional LAs are doing going forward and most have a similar scheme to Calderdale.

The Calder Learning Trust and Todmorden High School informed that they have decided not to de delegate, following discussions with both Heads and both Governing Bodies, and are therefore voting against the secondary element. This is not a reflection on how the scheme is working, it is about value for money for green schools.

Connie informed that without secondary buy in it would mean costs are £14.33 per pupil. Paul asked to remind Schools Forum Members that the low figure for last year included 50% subsidising from the DfE which has now finished.

Connie asked for clarity around if maintained secondary schools do not go with this model, the LA will need some steer if standards should slip, where would their support come from. Tony informed that the 2 maintained secondary schools would work together in partnership.

Primary vote:

Jo met with primary heads who voted for model 1. Primary Heads feel the associate model supports them really well.

Vote taken for model 1: approved unanimously.

To note:

- All maintained schools voted for the Summer term at a cost of £7.77 per pupil.
- The maintained secondaries did not vote for continuation after the summer term.
- The maintained primaries agreed to fund the shortfall for the Autumn and Spring term and the summer term at a total cost of £12.66 per pupil.

Item 7b the maintained schools agreed to fund the central expenditure via education functions which totals £43,976 at a cost of £3.79 per pupil (they told me it was £45k during the meeting so I quoted £3.88 but re reading the paper this morning its £43,976 hence the lower figure).

7. Review of services to schools

7A:

Q: Karen – the figures include termination costs, specifically for maintained schools in a deficit position and having extra help, academies cannot access this funding. Query whether historic commitments allow for this?

Discussion that termination costs to cover redundancies was brought forward and the LA are allowed to keep as a historic commitment, wound down 20% per year – clarification needed on this as some Schools Forum Members feel this is not a historical commitment. Jane to send the link to the legislation in the chat.

Q: discussion that this doesn't feel fair, as it is just for maintained schools, would it not be possible to be redistributed?

Martyn advised that cluster funding has not reduced as the historical element reduced, would the same conditions apply to cluster funding? Did the allocation get used last year? There is a balance, but this will be carried forward to the next year, as we are expecting a large call on this.

Education Welfare Service: proposal on forthcoming legislation. Recommendation that Schools Forum Members have sight of this prior to the deadline of 28 February 2023.

7B

Work ongoing in schools to support lack of attendance.

Vote taken on option 3B: 7 in favour, none opposed: passed by Schools Forum Members.

High Needs Block: Schools Forum Members were advised that the LA needs to provide assurances to the ESFA within 3 years that we are living within our means and will review moving forward.

Options A and B: there is no information in the report of the implications if Schools Forum agree option B, the impact on maintained schools budgets and the justification on why this is not coming out of LA general funds.

Academies already pay for a traded service, why would they pay again, so would not approve.

Second option, confirmation that next year this would just be for maintained schools. The Chair agrees, why would academies pay for this option twice.

Schools Forum Members asked what would be the implications of postponing an agreement; Jane advised she would not be able to send APT, she needs to submit figures by 28 February 2023.

Q: could Michael confirm whether this is a statutory responsibility for the LA to provide this and can the LA legally charge for a statutory duty?

Vote on option A:

4 in favour, approved to come out of DSG, however Schools Forum Members asked that reports where members are required to provide a decision, come to Schools Forum Meetings in a more timely manner to allow members to full explore options and implications.

8. Early Years funding – addendum

Q: why cannot the EY Improvement Officers, SM role and Business Support/Finance be managed with 46K?

Q from Primary Heads: are the increases already made, or is it a proposal? If funding is not approved, will the LA continue to fund 1 officer for additional capacity in the team, as there are some discretionary services, but they are all meeting statutory duties, or is an existing post under threat if we didn't bring under DSG at this stage?

The rising management costs are due to the restructure of the SM role. Before Connie came into post, the Senior SE Officer and another person lead on early years and there was a decision to being the 2 roles together; Connie is covering this role in the interim. It has not been possible to recruit to the role Connie is covering, there was no take up even with the market supplement. The role will be split back into 2 again with 1 EY Team Practitioner and 1 Senior SE Officer. We need

to ensure robust leadership for when the Family Hubs come on line. Family Hubs funding will not contribute to the management role, as streams are tied as to what they can spend money on.

Vote on all recommendations: unanimous approval.

9. Allocation of 2023/24 High Needs Block

Q: where have we got 1M available for special school hubs, or new hubs to support increased numbers going into Ravenscliffe, is there any provision for capital investment support?

David Graham explained that the only existing hub is the Copley pilot, in effect an extension/interface of the special school, staff are employed by the special school.

The LA is looking to extend the new hub arrangements, which will help deal with the massive increase in demand for special school places. Hopefully the free school bid will be announced in the next few weeks. Budget allocation will increase, which reflects the increased numbers we will attract.

Paul explained that given additional government money from the high needs block; there are times when additional funding is requested from the high needs block. There is no additional funding for EHCPs or capital development, we need to build this funding within the existing budget to pay for that. Hopefully we will get funding to build in the extras we need re schools places.

Exclusions are currently high, so we may need to buy in more places.

The LA is looking at a planned programme for capital spend and how we can deliver services such as Behaviour Support, Specialist Inclusion Team to support schools with young people with high needs and specialist placements in independent schools and address the deficit going forward.

The planning for the Hub Model will be resolved by the end of summer term.

Report noted.

Q: the 1.3M for the Whiteley Academy, is that top up funding? It is – 800K from FSA. Based on full capacity and extras 80 places, additional grant mandated to give by the LA.

10. Work Programme

To note, we have heard loud and clear reports need to be timely if a decision is needed. Paul will make it clear, however, there are extenuating circumstances as government provided late figures this time, Paul will make it clear to report authors that we need succinct reports submitted in a timely manner to ensure Schools Forum Members have time to read and make their decisions.

11. Any other business

None discussed.

12. Future dates

27 April 2023

22 June 2023

All meetings will start at 4pm via Teams.

Report to Schools Forum

Meeting Date	Thursday 22 June 2023
Subject	Impact of Allocation of Funding to School Improvement Clusters (half yearly report)
Report Author	Connie Beirne Interim Service Manager for Early Years and Schools Strategy and Performance

Report purpose
<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. The impact of funding to schools allocated through agreed bids up to October 2022, will be reported upon by November 2023, following evaluation at that point. This report contains a summary of the accounts provided by clusters (see section 3). Full information regarding each cluster's midyear progress report is available on request – see point 3P.</p> <p>b) To provide a summary of the impact of funding across Calderdale schools as a whole over the past financial year.</p>

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

Need for decision
<p>a) This report is for information about the impact of school improvement funds.</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>

Contact Officers
<p>Paul Tinsley – Interim Assistant Director for Education and Inclusion Paul.tinsley@calderdale.gov.uk</p> <p>Connie Beirne - Interim Service Manager for Early Years and School Strategy and Performance connie.beirne@calderdale.gov.uk</p>

Report to Schools Forum

1. Background information and context

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

Funding for the financial year 2022-23 was:

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

Funding for the financial year 2023-24 is:

Ongoing DSG Funding	£364,000
Brought Forward deficit	-£35,102.63
Budget	£328,897

3. As these funds are top sliced from the historic element of Calderdale's Dedicated Schools Grant (DSG), they can be accessed by both maintained schools and academies, through funding allocated to clusters. For 23/24, no central funds are retained for the submission of bids. The Board made the decision in March 2023, that all funds would now be distributed to each school cluster. However, DSG funding is restricted to Pre-16 pupils, in which case these funds are not available for Post 16 provision.

2. Main issues for Schools Forum

- 1) £106,364 was brought forward from the financial year 2022-23, which with the budget allocation of £364,000 and the additional one-off funding of £96,000 from DSG savings that was approved by Schools Forum, gave a total budget for 2022-23 of **£566,364**. The total spend in 2022-23 was £601,466.63, leaving a deficit of **£35,102.63** brought forward. This deficit arose from the allocation of funds via the CPSIB to successful bids.

- 2) Whilst the historic element of the DSG is reducing once again by 20% in 2023-24, there remains sufficient funding to allocate the annual budget of £364,000 to the CPSIB. The total proposed budget for 2022-23 will therefore be £328,897 which will allow for effective resourcing of agreed school improvement activity. (**Appendix 1**).
- 3) During 22/23, the CPSIB considered each bid against the criteria in the Partnership Framework, with a particular focus on supporting proactive bids that benefit several schools and which are supported by evidence-based research. An increasing number of bids presented focused upon addressing children's speech, language and communication needs in our primary schools via a programme called LINGO. By October 22, the CPSIB found itself in a deficit position, so no further bids were considered after this point. In March 2023, the CPSIB made the decision that no central funds would be held back for bids and all monies would be distributed based upon the previous formula used to school clusters. The CPSIB would revisit its terms of reference and focus upon their role of quality assurance and accountability as to the priorities, spending and impact of the work undertaken by each school cluster. The work of each school cluster will therefore be discussed and a more robust system of evaluation will be implemented.
- 4) A summary of the impact of allocations for funds held centrally can be found in **Appendix 2**. Please contact Connie Beirne - Connie.beirne@calderdale.gov.uk for full details. Impact reports will be presented for bids funded between March 2022 and October 2022 by the Board meeting in November 2023.
- 5) A summary of the itemised Cluster Finance Reports is included in **Appendix 1** for information.
- 6) As reported in November 2022, two maintained primary schools were eligible for the DFE School Improvement/Trust Support offer in 2022-23. All eligible schools were able to access 3 days of NLE support, and going forward, as other schools receive Ofsted judgements of Requires Improvement, we continue to work with the DFE and schools to access this free offer of support.
- 7) A programme of improvement work, through clusters and the Calderdale Primary Development Programme has continued to address key priorities. Work has also taken place to support schools with curriculum development. These programmes have been highly successful and impact is evident in schools.
- 8) Maintained schools causing concern continue to have contact from their allocated School Effectiveness Officer/Associate during the summer term and with School Forum's decision for funding being made available to continue the Local Authority's statutory duty of support, challenge and brokering of support through to March 2024.

3. Impact of funding, targets and milestones

- a) 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.
- b) Use of DSG funding enables clusters to be professionally led by a Cluster Officer (remunerated through cluster funding) and a Cluster Lead Headteacher. As a result, the

improvement plans are sharply focused in clusters to ensure that local priorities are addressed, linked to the LA priorities and development plans.

- c) Cluster funding is used to provide support and challenge to schools where concerns are identified enabling early intervention and an additional level of support prior to any bids being previously submitted to the CPSIB.
- d) Early Years has seen a change of framework since 2019 and is therefore no longer directly comparable to that year. Calderdale overall results in the **Good Level of Development** measure 2022 are slightly above national and gaps between key pupil groups have narrowed due to national results having declined to a greater extent. The current position is that Calderdale is at 65.4% of pupils and national at 65.2%.
- e) Primary Assessment results in 2022 were generally positive for Calderdale. The pandemic has seen most primary statutory assessment results decline across the country, with most of the national headline results dipping by more than six percentage points since 2019 when assessments were last conducted. Results in Calderdale have also declined although generally to a lesser extent so that Calderdale results are much closer to and in some cases above national compared with 2019.
- f) In 2019 the proportion of children meeting the standard for the Year 1 **phonics** check was 0.7 percentage points above national, this increased to 3.8 percentage points in 2022. This gap emerged during the pandemic where there was a sharp national decrease in results from 2019 to 2020 and now an even greater decrease from 2021 to 2022. That decrease has not been seen to the same extent in Calderdale where 79.3% of year one pupils were at the expected standard compared to 75.5% nationally.
- g) **Key Stage 1** results in Calderdale and nationally have been heavily impacted by the pandemic, though the drop in results in terms of pupils achieving the expected standard has been less severe in Calderdale than nationally which has had the effect of substantially narrowing the gap for all pupils. The gap in pupils achieving the greater depth standards has also narrowed, but not to the same extent as at the expected standard.
- h) At **Key Stage 2** both mathematics and writing declined nationally and similar reductions in outcomes were seen in Calderdale with 58.6% of pupils achieving the expected standard in reading, writing and mathematics leaving the LA once again very close to national. It remains the case that at the Higher standard, results for Calderdale pupils are below those of their national counterparts, indicating an ongoing area for improvement, but with some narrowing of the gap compared to 2019.
- i) Progress from **Key Stage 1 to Key Stage 2** is above the national average in all three subjects, but particularly reading and maths.
- j) **Key Stage 4 – GCSE** results in Calderdale in 2022 are slightly below national in the main accountability measures for attainment (Attainment 8) after several years of being above, and more significantly below average for progress from KS2 to KS4. Results have, however, been impacted by a change of accountability measures in 2022. Removal of results obtained by pupils in Year 10 in 2021 have been excluded from accountability measures and disproportionately affected those schools that entered students in Yr. 10 for some subjects and the overall LA figures. Other measures, including those attaining 9-5 grades in both English and maths, which includes early entries, remained moderately above national average, but with some relative decline.

- k) Key Stage 5 (A-Level and Post 16) –** Level 3 results in Calderdale dipped in 2022 and were below national averages with a widening gap compared to 2019. The proportion of students attaining at least two A levels increased but to a lesser extent than seen nationally and remained below average with a widening gap.
- l)** The Education Recovery Plan 2021-26 included four strands of work: Education Recovery, Wellbeing, Workforce Development and Digital Inclusion. Much of the work taking place now as other LA priorities have come into focus, across clusters, links to one or more of these strands of work
- m)** The School Effectiveness team will continue to engage headteacher in their own self-assessment process, with the publication of statutory assessments in July 2023. This was very successful last year, with fifty-nine returns made, in ensuring an accurate LA risk assessment for each school. Heads also provided information around their strengths and challenges for the coming year.
- n)** The School Effectiveness team will work with Business, Performance and Intelligence officers to conduct a detailed analysis of unvalidated data 2023. This can then be shared and discussed with Cluster officers in ensuring that their cluster plans for 2023/24 reflect both LA and cluster school priorities.
- o)** 83% of Calderdale primary schools were judged to be Good or better at the end of April 2023 compared to 88% nationally. The proportion of primary schools that are judged good or better is 83% compared with a national of 89% and at secondary 69% compared with a national of 80%. The special schools compare favorably with national with 100% good or better compared with national at 89%. Improving the Ofsted rating of schools in Calderdale remains a priority to be addressed but out of thirty-two inspections so far, this academic year, only two schools were judged requires improvement with the rest maintaining a judgement of good or outstanding. The school improvement model is having the required impact of addressing needs swiftly and robustly in our maintained schools causing concern.
1. Full midyear cluster reports are available upon request from Carolyn.rooke@calderdale.gov.uk However, highlights from the reports include:

Name of Cluster	Progress on priorities	Funding use
East Calderdale	1. Writing outcomes improved – Network leads set up and moderation taken place 2. Provision of a Quality, Inclusive Curriculum – All Lingo staff training, specialist support for identified pupils in place	£800 per term to release network leads £109,456 (cluster bid)
North Halifax	1. Attendance – scope of project determined, data collected and strategies being determined to reduce PA 2. Provide access to resources and inclusive provision for pupils with additional needs – Exclusion data interrogated and sharing of behaviour and re-integration strategies	No cost, working with LA officer No cost
Calder Valley	1. English – Networks in place, reading strategies investigated, LINGO launched. Four schools involved in EEF literacy project. 2. Quality of education – Networks in place with a focus upon maths and foundation subjects. Focus upon meeting needs of SEND pupils	All Cluster funds spent for 22/23
Elland	1. Writing outcomes improved for SEND and disadvantaged pupils - Majority of schools report that data indicates school is on track 2. 100% of pupils attain the targets established for them by their school – Majority of schools report that data indicates school is on track. EY and SEND networks amalgamated to pilot Dingley's project with LA. Positive feedback 'my voice matters' project	All Cluster funds spent for 22/23
Todmorden	1. Improved Language acquisition (LINGO) – Project now in Y2, staff training, seventy-two children specialist support received and high school involvement for first year. All Heads positive and see impact on children 2. Improve attendance – FSW recruited and improved attendance seen for those 'hard to reach' families 3. Best practice curriculum planning and development – Not begun due to lack of funds	All Cluster funds spent for 22/23
Sowerby Bridge	1. Improve attendance - scope of project determined, data collected and strategies being determined to reduce PA 2. Provision of a Quality, Inclusive Curriculum – All Lingo staff training, specialist support for identified pupils in place	All Cluster funds spent for 22/23
Secondary	1. Improve pupil wellbeing – Ed Psychology service commissioned 2. Improve attendance – Sharing of strategies to reduce suspensions and Pex	All Cluster funds spent for 22/23

	3.CPD – Leadership programme being delivered by Crossley Heath 4.Cluster networks- continued 5.Ofsted ready- Triad peer reviews in place	
Special	1.Emotional wellbeing for Heads – Coaching programme in place 2.Curriculum development – Maths, reading and PSHE networks established 3.CPD opportunities shared 4.Sustainable ITT programme explored	All Cluster funds spent for 22/23

4. Resource implications

- 1 The funding for the self-improving school cluster model appears to be having a positive impact on improving outcomes for children.

5. Recommendations

- a) The Schools Forum accepts this report on the allocation of funding to school improvement clusters.
- b) The Schools Forum notes this report and provides feedback on the contents of the report.

6. Reasons for recommendations

1. Schools have continued to experience challenges post-pandemic and the work of clusters and the School Effectiveness Service has been vital in supporting schools to respond and continuing to focus on the quality of education and the safeguarding, health and wellbeing of pupils and staff.
2. Whilst the impact of funding allocation is evident through the excellent response of schools and the improvements already secured, further work is required to ensure children in Calderdale achieve at least as well as their peers nationally at all key points and are educated in schools that are at least Good.
3. School improvement funding is required to support clusters and schools in closing those gaps. At present, there remains thirty-five schools (academies and maintained) who are risk assessed as having concerns or significant concerns that they need to be supported to address the priorities needed to improve.

7. Appendices

Appendix 1

Calderdale Partnership School Improvement Board

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

Cluster Funding - Allocation 2022-23		Additional Fund allocation (Heads backfill £2,250 and additional £2K per cluster)
Calder Valley (Midgley)	£23,512	£4,250
East Calderdale (Woodhouse Primary School)	£32,890	£4,250
Elland (Cross Lane)	£26,956	£4,250
North Halifax (Christ Church Pellon)	£37,135	£4,250
Secondary (The North Halifax Grammar)	£67,345	£4,250
Sowerby Bridge (St Mary's J&I Sowerby)	£26,671	£4,250
Todmorden (Walsden St Peter's)	£24,136	£4,250
Special Provision (William Henry Smith)	£20,320	£4,250
Total	£258,965	£34,000

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

Funding for Financial Year 2023-24	£
On-going Budget	£364,000

Balance Brought Forward deficit	£35,102.63
Budget	£328,897

Cluster Funding - Allocation 2023-24	
Calder Valley (Midgley)	£30,038
East Calderdale (Woodhouse Primary School)	£41,467
Elland (Cross Lane)	£33,719
North Halifax (Christ Church Pellon)	£45,513
Secondary (The North Halifax Grammar)	£84,079
Sowerby Bridge (St Mary's J&I Sowerby)	£33,561
Todmorden (Walsden St Peter's)	£30,358
Special Provision (William Henry Smith)	£30,161
Total	£328,897

Total all funding	£328,897
Cluster Formula allocations – as above	£328,897
Balance available	0

Appendix 2 – Impact of Allocation of Funding – Impact reports to CPSIB July/November 2023

Bids Agreed July 2022 – Oct 2022	
East Calderdale Cluster (LINGO)	£82,092
School Effectiveness (Subject leaders training and development programme)	£14,160
Todmorden and Calder Valley clusters with Calder and Todmorden High Schools (LINGO)	£67,800
North Halifax (LINGO)	£57,765
Sowerby Bridge Cluster (LINGO)	£64,077
Christ Church Pellon Primary (SCC)	£38,165

Report to Schools Forum

Meeting Date	22 June 2023
Subject	Maintained School balances as at 31 March 2023 and Three year Budget plans
Report Author	Jane Davy

Report purpose
To provide Schools Forum with the final revenue balances for all maintained schools at the end of the 2022/2023 financial year and the estimated revenue balances for all maintained schools following receipt of their budget plans for the next three years.

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

Need for decision
N/A

Contact Officers
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Report to Schools Forum

1. Background information and context

- a) All schools hold revenue balances at the end of each year to allow for unforeseen events and emergencies, and in some cases to smooth out the effects of changes in school rolls, changes to staffing structures and one off expenditure such as building work.
- b) The Council holds separate reserves or balances to cover the same events for all other Council expenditure. Schools are specifically excluded from the use of these balances and therefore need to maintain their own balances.
- c) School Forum agreed to maintain the clawback mechanism in the scheme for financing schools to ensure schools could be held to account if they held excessive balances.
- d) The Scheme for Financing Maintained Schools requires maintained schools to submit a three-year budget statement by the beginning of May, detailing how school resources are planned to be spent. These statements also show estimated school balances at the end of each year.
- e) The Scheme also requires school budget plans to be approved each year by the Local Authority. This is generally light touch but facilitates more work being undertaken where budget deficits are being projected
- f) This report covers Calderdale's 52 maintained schools (1 through school, 1 secondary, 47 primary and 3 special schools) and excludes academies that are subject to separate Education and Skills Funding Agency (ESFA) monitoring.

2. Main issues for Schools Forum

- a) Schools initially projected collective surplus balances of £9.42 million as at 31st March 2023. Their recent spring term monitoring statements projected revised surplus balances of £8.2 million.
- b) The accounts for all schools are now closed and the overall level of balances in Calderdale's 52 maintained schools (including community focused balances and cluster fund balances) is £10.15 million. Within this sum the amounts per sector are primary £5.94 million, secondary £1.89 million, and special £2.32 million.

This is an overall increase in balances on last year of £733k. A summary of the revenue balances held by each sector compared to last year is shown below (adjusted for academy conversions in year):

	Balances as at 31 March 2022	Movement	Balances as at 31 March 2023
	£000's	£000's	£000's
Primary	6,535	-598	5,937
Secondary	1,182	+709	1,891
Special	1,700	+622	2,322
Total	9,417	+733	10,150

- c) In the secondary school sector, there are two LA maintained schools, both of which have increased their surplus.
- d) In the primary sector balances have reduced overall, two schools are in deficit, 45 Schools are in surplus. 4 schools are holding balances more than 20% of their annual income. 5 schools are holding balances either less than £40k or less than 2% of total income.
- e) In the special school sector, 2 schools balances have increased, 1 school is holding balances over 20% of total income. However, it is known this school will be using a significant amount to fund building programme in 23/24
- f) The Local Authority, in consultation with Schools Forum, introduced a balance control mechanism in 2011. In the first two years of the mechanism schools with balances above the recommended threshold were required to provide evidence of their commitments and some were subject to time limited arrangements at the end of 2011/12. However, Schools Forum agreed to suspend the balance control mechanism for 2020/21, 2021/22 and 2022/23. As mentioned above in 1c it was agreed to keep the clawback mechanism in the Scheme for Financing Schools so that the LA and Schools Forum can hold any school to account if they continue to hold excessive balances over several years.
- g) It is surprising that school balances have increased overall. However, with only 7/12ths effect of increased pay award's, the teacher's pay award still not agreed for 22/23 and 23/24, support staff pay award not yet agreed for 23/24, increase in energy costs and inflation at highest rate for many years, many schools will have put projects, purchase of resources and recruitment on hold to ensure they are sustainable moving forward.
- h) Maintained schools were asked to submit their three year budget plans by 1st May 2023, 36 budget statements were received by the deadline, the remaining 16 returns were received by the 25th May 2023. At the time of writing the reports 47 schools have been written to approving their budgets. 5 schools are projecting deficit budgets and will be written to individually, 2 of the 5 schools will be written to asking for further information along with a requirement to have a robust and sustainable recovery plan that has to be agreed by both the Interim Head of Finance and the Director of Children and Young People's Services.
- i) From the 47 Schools, 19 schools are projecting to be in surplus for all three financial years. 15 schools are projecting to be in surplus for two years and then fall into deficit in year three, these schools will receive letters approving 23/24 and asked to

look at making future savings when setting their 24/25 to 26/27 budgets. 12 Schools are projecting a surplus for 23/24 with deficits for 24/25 and 25/26, these schools will be asked submit monthly monitoring statements and to resubmit a budget for 24/25 in October 23 when future pupil numbers and funding will be more certain.

- j) As mentioned above balances brought forward from 22/23 total £10.1million, maintained schools plan to reduce this to £7.6 million by March 24. Primaries reducing to £4m, secondaries increasing to £2.3m and special schools reducing to £1.3m
- k) For the longer 3 year period 31 schools are projecting deficit balances. However, schools have been prudent when projecting income for year three due to lack of information and based their budgets on known funding available. If the increase in income is not sufficient, these schools will have to look at reducing their expenditure from 24/25 onwards.
- l) At the time of presenting this report all schools (except 2) should have received a letter confirming that their submitted budget for 23/24 has been approved, as mentioned above some of those letters sound caution around the longer term projections and advise schools of the need to re-examine their plans for future years.
- m) Appendix A shows individual balances as at 31st March 23 and projected balances as at 31st March 24

3. Recommendations

1. Members note the maintained schools' balances as at 31 March 2023.
2. Members note the original budget projections for the next three financial years.
3. A report is brought to the autumn term meeting based on Autumn 2023 projections.

4. Reasons for recommendations

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

5. Impact of funding, targets, and milestones

None unless Clawback mechanism is implemented

6. Resource implications

None unless Clawback mechanism is implemented

7. Appendices

Balances as at 31 March 23 and projected balances as at 31st March 24

School Name	Revenue surplus bfwd from 22/23	Forecasted 23/24 in year deficit	Forecasted balance as at 31st March 24
All Saints' CE (VA) J & I School	£	£	£
Ash Green Primary School	117,191	-9,118	108,073
Bailiffe Bridge J & I School	165,966	-111,903	54,063
Barkisland CE (VA) Primary School	97,020	-28,319	68,701
Carr Green Primary School	115,125	-18,381	96,744
Castle Hill Primary School	-69,816	2,864	-66,952
Central Street Infant & Nursery School	79,895	-38,389	41,506
Christ Church (Pellon) CE (VC) Primary School	178,794	-65,041	113,753
Christ Church CE (VA) Junior School (Sowerby Bridge)	-33,923	2,357	-31,566
Cliffe Hill Community Primary School	32,824	28,667	61,491
Colden J & I School	54,313	-47,929	6,384
Copley Primary School	42,578	-20,686	21,892
Cornholme J, I & N School	273,831	-4,878	268,953
Cross Lane Primary School	103,162	-4,210	98,952
Elland CE (VA) J, I & N School	54,482	-17,860	36,622
Ferney Lee Primary School	282,126	-19,829	262,297
Hebden Royd CE (VA) Primary School	157,254	-51,115	106,139
Heptonstall J, I & N School	96,110	-12,460	83,650
Holywell Green Primary School	24,634	-53,239	-28,605
Ling Bob J, I & N School	90,956	-14,114	76,842
Longroyde Primary School	225,393	-127,908	97,485
Luddenden CE School	19,309	35,113	54,422
Midgley School	135,334	-105,613	29,721
Moorside Community Primary School	167,235	-11,288	155,947
New Road Primary School	151,734	-31,502	120,232
Norland CE (VC) J & I School	185,387	-22,455	162,932
Northowram Primary School	118,520	-19,926	98,594
Old Town Primary School	141,201	-89,693	51,508
Parkinson Lane Community Primary School	58,738	-45,339	13,399
Ripponden J & I School	742,541	-56,850	685,691
Riverside Junior School	162,095	-11,045	151,050
Salterhebble J & I School	144,137	-33,163	110,974
Savile Park Primary School	41,824	-29,542	12,282
Shade Primary School	250,128	-283,871	-33,744
Shelf J & I School	22,556	-915	21,641
St Andrew's CE (VA) Infant School (Brighouse)	38,493	-20,677	17,816
St Andrew's CE (VA) Junior School (Brighouse)	45,922	-46,237	-315
St Mary's CE (VC) J & I School (Sowerby Bridge)	173,739	-103,414	70,325

St Michael & All Angels CE Primary School	84,535	980	85,515
Stubbings Infant School	70,392	-2,550	67,842
Todmorden CE (VA) J & I School	76,601	-38,761	37,840
Triangle CE (VC) Primary School	297,842	-72,814	225,028
Tuel Lane Infant School	100,591	-16,558	84,033
Walsden St Peter's CE (VC) Primary School	25,718	-910	24,808
Warley Town School	176,615	-57,168	119,447
Withinfields Primary School	65,302	-11,810	53,492
Woodhouse Primary School	86,997	-4,863	82,134
PRIMARY TOTAL	5,671,399	-1,692,362	3,979,037

Calder Learning Trust	0	0	0
Todmorden High School	1,253,745	232,762	1,486,507
SECONDARY TOTAL	1,253,745	232,762	1,486,507

Highbury School	0	0	0
Ravenscliffe High School	413,490	-104,625	308,865
Woodbank Primary School	685,605	-20,270	665,335
SPECIAL TOTAL	1,099,095	-124,895	974,200

OVERALL TOTAL	8,024,240	-1,584,495	6,439,745
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Report to Schools Forum

Meeting Date	22 June 2023
Subject	Movement of 0.5% Schools Block Funding to High Needs Block
Report Author	Jane Davy/David Graham/Steve Drake

Report purpose

To give School Forum members notice of the LA's proposal to ask members to vote on moving 0.5% of 24/25 Schools Block funding to High Needs Block in the Autumn Term 2023.

Need for consideration

Schools Forum to consider and give a view on the report.

Need for decision

N/A at this meeting

Contact Officers

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Report to Schools Forum

1. Background information and context

Local authorities' DSG consists of 4 blocks of funding:

- Schools Block
- Central schools services block (CSSB)
- High needs block
- Early years block

The schools block is ring fenced, however local authorities can transfer up to and including 0.5% of their schools block funding into another block, with the approval of their school forum. Without schools forum agreement, or where they wish to transfer more than 0.5% of their schools block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.

On requesting transfer of funding, the Department for Education (DfE) expects to see evidence of recent school forum discussion and the school's forum vote. This includes where school's forum have already agreed DSG recovery plans that assume future years transfers.

The LA has to consult with all maintained schools and academies, and school forum should take these views into account before making their decision.

2. Main issues for Schools Forum

- a) Local authority officers have considered moving funds between blocks in previous years and decided against it due to being able to manage the pressures of high needs within the high needs block. However, in 22/23 the LA for the first time found themselves in deficit of £800k on the high needs DSG. This was due to increased spending in DCATCH, Out of Authority Special School Placements & Specialist Inclusion Team.
- b) In setting the 23/24 high needs budget the LA set aside £100k from the 2023/24 budget to offset the 22/23 overspend to fund some of the deficit. However, we are now seeing significant pressures on the HNB due to increases noted in 2a and in permanently excluded pupils, movement of pupils to special school, particularly Independent Non-Maintained Special Schools and an increase in the numbers of pupils in Early Years requiring specialist placements and support. The continued increase in demand for Statutory Assessment (Table 3) resulting in increased numbers of EHCP's (Table 4) is also adding to the financial pressure on HNB.

Table 3 Increase in Statutory EHC Needs Assessments

NUMBER OF ASSESSMENTS					
Academic year	Total new requests	Total Yes	Total No	% Yes (yes to assess)	% No (no to assess)
2017/18	189	141	48	74.60%	25.40%
2018/19	214	176	38	82.24%	17.76%
2019/20	288	222	66	77.08%	22.92%
2020/21	341	264	77	77.42%	22.58%
2021/22	442	336	106	76.02%	23.98%
2022/23	382	265	48	69.37%	12.27%
					To date

Table 4: Number of Final EHC Plans Issued

NUMBER OF FINAL PLANS ISSUED			
Academic year			
01/09/2017	31/08/2018	135	
01/09/2018	31/08/2019	150	
01/09/2019	31/08/2020	226	
01/09/2020	31/08/2021	241	
01/09/2021	31/08/2022	284	
01/09/2022	09/06/2023	274 to date	Potentially another 136 to issue by 31/8/23 = 410

- c) Permanently excluded pupils and suspensions are further factors- Table 1 B provides information on the increase of both permanently excluded and suspended pupils. To place a pupil in the pupil referral unit costs the LA £800k per annum plus £15k per pupil up to a maximum of 80 pupils, any additional pupils above the 80 cost £25k per annum, this increases significantly if pupils are placed outside the borough, the LA does recoup some funding from schools and academies in accordance with the school finance regulations, the current maximum to recoup is £6,424 per annum for a key stage 4 pupil falling to £5,822 per annum for a Key Stage 1 pupil

Table 1: Permanent Exclusions

Year	2019/20 No & % of school population		2020/21 No & % of school population	2021/22 No & % of school population			2022/23 To Date No & % of school population	
Children at KS1	0	0%	1	0.003%	6	0.019%	2	0.006%
Children at KS2	5	0.017%	7	0.02%	5	0.016%	16	0.04%
Children at KS3	17	0.05%	15	0.05%	44	0.14%	43	0.13%
Children at KS4	12	0.03%	18	0.06%	23	0.076%	19	0.06%
Total	34		40		78		80	

Table 2: Suspensions

Year	2019/20	2020/21	2021/22	2022/23 to date
Calderdale Number of suspensions sessions	1210	2034	3924	3352
Primary (as a % of total)	214(18%)	245 (12%)	315 (8%)	484 (14%)
Secondary (as a % of total)	996 (82%)	1789 (88%)	3609 (92%)	2868 (86%)

- d) Increase in early years inclusion funding from High Needs Block- This has been steadily increasing over the last three years;
- 21/22 £464k
 - 22/23 £635k
 - 23/24 £1 million

There has been a continued increasing demand for support for children within the early years who have been identified as having special educational needs. The Inclusion Fund is for those children who already have identified needs and have agencies working together to support them. The funding is based on the needs of the child and supports practitioners to improve the child's early learning and development outcomes. The funding is to implement low level, early support to improve outcomes for the child and reduce longer term costs. Providers use the Inclusion funding for:

- Extra staff time to support specific interventions.
- Specialist or one-off extra training, or to upskill a team or staff member.
- Specialist support, such as speech and language therapy, which may benefit more than one child.
- Support for coordinating key worker duties, such as the team around the child.
- Help for children who are transitioning to school, releasing key workers to support the process by spending time at the school.

- e) (I) Increase in Special School Places- Special school places have been steadily increasing over the last 5 years. It is anticipated that a minimum of 50 places will be required by the academic year 23/24.

Table 3: Increase in Primary Special School Places 2018 – 2023 School		Rec	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Highbury School	Oct-18	14	13	11	9	11	16	5	79
	Oct-19	12	17	14	13	11	11	17	95
	Oct-20	12	14	19	16	16	13	11	101
	Oct-21	11	14	14	21	16	16	13	105
	Oct-22	9	13	15	15	20	15	15	102
	Sep-23	23							
Wood Bank School	Oct-18	7	13	8	8	13	13	10	72
	Oct-19	10	9	14	8	9	13	13	76
	Oct-20	9	10	12	17	10	9	13	80
	Oct-21	25	14	18	15	18	11	9	110
	Oct-22	9	27	15	17	17	18	10	113
	Sep-23	21							

Table 4: Increase in Secondary Special School Places 2018 – 2023

School		7	8	9	10	11	12	13	14	Total
Ravenscliffe High School and Sports College	Oct-18	28	24	35	23	16	18	17	20	181
	Oct-19	26	31	25	29	30	14	18	15	188
	Oct-20	41	24	32	27	34	24	15	16	213
	Oct-21	34	40	24	32	27	32	23	13	225
	Oct-22	36	34	40	24	32	27	32	20	245
	Sep-23	34								

(II) Independent Special School places have increased by 20 between June 22 and June 23 at an average cost of £56,468.00. Independent Non-Maintained Special Schools range between £35,000.00 and £128,000.00 per annum.

- f) The LA will have to provide the DfE with a DSG recovery/management plan. LA Officers will look for possible service savings and it is anticipated that by building additional capacity locally we will, over time, see a reduction in costs for out of borough and high-cost independent placements. However, unfortunately, the only feasible way that officers can address the deficit within the next 2-3 years is by asking for a transfer from the Schools Block, as continued pressure is expected over the next academic year.
- g) Officers are asking for views in the summer term so that it gives both members and officers time to prepare all the information for the autumn meeting and to consult with all the maintained schools and academies in September 23.
- h) 0.5% of schools block funding equates to £921K of 22/23 funding this will be updated when 23/24 funding is known. An impact analysis has been provided at Appendix A.

- i) When setting the High Needs Block Budget for 2024/2025 Officers will re-consider the need for repeating the transfer of 0.5% and should demand continue requesting consideration of a higher level of transfer to achieve a balanced budget. Prior to this Officers will proactively look at areas of potential savings during the current financial year and consult with schools and Schools Forum.

2) Recommendations

- a) Members to provide a view on the LA's proposal to move 0.5% from the Schools block to the High Needs Block for 23/24.

Appendix A

Impact Analysis

School Name	Pupil Numbers	Funding Formula £	Pupil Numbers	Funding Formula £	Increase/ Decrease	% Increase/ Decrease
Abbey Park Academy	197	1,059,864	197	1,051,355	-8,509	-0.80%
Trinity at Akroydon Primary	289	1,469,323	289	1,464,596	-4,727	-0.32%
All Saints' CofE VA Junior and Infant School	212	937,253	212	937,253	0	0.00%
Ash Green Community Primary School	404	2,290,166	404	2,268,086	-22,080	-0.96%
Bailiffe Bridge Junior and Infant School	198	916,013	198	911,125	-4,888	-0.53%
Barkisland CofE VA Primary School	194	857,782	194	857,782	0	0.00%
Beech Hill School	461	2,519,039	461	2,519,039	0	0.00%
Bolton Brow Primary Academy	210	964,673	210	959,282	-5,391	-0.56%
Bowling Green Primary School	145	708,894	145	705,024	-3,869	-0.55%
Bradshaw Primary School	331	1,463,363	331	1,463,363	0	0.00%
Brighouse High School	1,032	6,288,431	1,032	6,248,395	-40,036	-0.64%
Burnley Road Academy	180	880,550	180	875,076	-5,474	-0.62%
Calder Learning Trust	1,370	8,218,402	1,370	8,166,952	-51,450	-0.63%
Carr Green Primary School	312	1,446,744	312	1,437,479	-9,265	-0.64%
Castle Hill Primary School	182	882,777	182	877,760	-5,018	-0.57%
Central Street Infant and Nursery School	59	377,598	59	375,924	-1,674	-0.44%
Christ Church CofE VA Junior School, Sowerby Bridge	110	618,570	110	614,529	-4,040	-0.65%
Christ Church Pellon CofE VC Primary School	168	978,173	168	970,189	-7,984	-0.82%
Cliffe Hill Community Primary School	169	953,540	169	953,540	0	0.00%
Colden Junior and Infant School	77	477,749	77	476,130	-1,619	-0.34%
Copley Primary School	289	1,310,211	289	1,310,211	0	0.00%
Cornholme Junior, Infant and Nursery School	148	832,177	148	826,162	-6,015	-0.72%
Cross Lane Primary and Nursery School	305	1,546,479	305	1,534,334	-12,145	-0.79%
Dean Field Community Primary School	199	1,116,123	199	1,106,429	-9,694	-0.87%

Elland CoFE Junior and Infant School	160	974,185	160	965,326	-8,859	-0.91%
Ferney Lee Primary School	181	1,021,428	181	1,021,428	0	0.00%
Field Lane Primary School	99	631,298	99	626,198	-5,100	-0.81%
Hebden Royd CoFE VA Primary School	92	479,434	92	477,410	-2,024	-0.42%
Heptonstall Junior Infant and Nursery School	67	396,781	67	396,781	0	0.00%
Holy Trinity Primary School, A Church of England Academy	351	1,710,417	351	1,698,397	-12,020	-0.70%
Holywell Green Primary School	166	835,877	166	830,945	-4,933	-0.59%
Lee Mount Primary School	307	1,661,046	307	1,646,348	-14,699	-0.88%
Lightcliffe Academy	977	6,245,499	977	6,201,518	-43,981	-0.70%
Lightcliffe CoFE Primary School	414	1,829,097	414	1,829,097	0	0.00%
Ling Bob Junior, Infant and Nursery School	306	1,695,584	306	1,691,665	-3,919	-0.23%
Longroyde Primary School	374	1,707,755	374	1,696,407	-11,348	-0.66%
Luddenden CoFE School	100	594,010	100	590,391	-3,619	-0.61%
Luddendenfoot Academy	191	850,535	191	846,519	-4,016	-0.47%
Midgley School	95	509,297	95	507,068	-2,229	-0.44%
Moorside Community Primary School	207	1,207,198	207	1,196,929	-10,269	-0.85%
Mount Pellon Primary Academy	294	1,599,347	294	1,599,347	0	0.00%
New Road Primary School	162	860,271	162	860,271	0	0.00%
Norland CE School	76	432,050	76	430,217	-1,833	-0.42%
Northowram Primary School	405	1,821,401	405	1,821,401	0	0.00%
Old Earth Primary School	412	1,840,501	412	1,828,266	-12,235	-0.66%
Old Town Primary School	71	403,702	71	403,108	-594	-0.15%
Park Lane Academy	449	3,499,573	449	3,468,947	-30,627	-0.88%
Parkinson Lane Community Primary School	524	2,793,036	524	2,768,809	-24,227	-0.87%
Rastrick High School	1,743	10,437,870	1,743	10,371,896	-65,974	-0.63%
Ripponden Junior and Infant School	195	922,628	195	917,535	-5,093	-0.55%
Riverside Junior School	143	700,592	143	697,109	-3,483	-0.50%
Ryburn Valley High School	1,383	8,608,235	1,383	8,554,398	-53,837	-0.63%
Sacred Heart Catholic Voluntary Academy	192	985,916	192	978,799	-7,116	-0.72%
Salterhebble Junior and Infant School	209	1,002,101	209	996,370	-5,731	-0.57%
Salterlee Primary School	101	501,353	101	499,410	-1,943	-0.39%

Savile Park Primary School	364	2,293,878	364	2,293,878	0	0.00%
Scout Road Academy	100	506,551	100	504,919	-1,631	-0.32%
Shade Primary School	178	854,222	178	854,046	-176	-0.02%
Shelf Junior and Infant School	257	1,148,583	257	1,148,583	0	0.00%
Siddal Primary School	183	983,308	183	975,759	-7,549	-0.77%
Trinity Academy St Peters	106	637,129	106	632,343	-4,787	-0.75%
St Andrew's Church of England (VA) Infant School	166	834,599	166	829,241	-5,359	-0.64%
St Andrew's CofE (VA) Junior School	208	1,019,293	208	1,012,499	-6,793	-0.67%
St Augustine's CofE VA Junior and Infant School	146	888,742	146	881,553	-7,189	-0.81%
Trinity Academy St Chads	151	698,072	151	694,924	-3,148	-0.45%
St John's (CofE) Primary Academy, Clifton	208	933,789	208	929,008	-4,781	-0.51%
St John's Primary School In Rishworth	144	664,404	144	661,534	-2,870	-0.43%
St Joseph's Catholic Primary School	164	808,368	164	803,735	-4,633	-0.57%
St Joseph's Catholic Primary School, Brighouse	195	920,900	195	915,468	-5,432	-0.59%
St Joseph's RC Primary School, Todmorden	122	712,708	122	707,264	-5,444	-0.76%
St Malachy's Catholic Primary School, A Voluntary Academy	148	912,974	148	904,698	-8,275	-0.91%
St Mary's Catholic Primary School	303	1,533,310	303	1,522,124	-11,185	-0.73%
St Mary's CofE (VC) J and I School	98	507,834	98	505,747	-2,087	-0.41%
St Michael and All Angels CofE Primary & Pre School	188	877,778	188	872,914	-4,863	-0.55%
St Patrick's Catholic Primary School	101	558,418	101	555,407	-3,010	-0.54%
Stubbings Infant School	33	256,313	33	255,537	-777	-0.30%
The Brooksbank School	1,419	8,744,925	1,419	8,686,380	-58,545	-0.67%
The Crossley Heath School	903	5,182,866	903	5,182,866	0	0.00%
The Greetland Academy	410	1,837,619	410	1,837,619	0	0.00%
The Halifax Academy	1,438	9,591,213	1,438	9,591,213	-0	0.00%
The North Halifax Grammar School	899	5,163,180	899	5,163,180	0	0.00%
Todmorden CofE J, I & N School	204	1,021,993	204	1,014,868	-7,125	-0.70%
Todmorden High School	891	5,722,976	891	5,683,933	-39,043	-0.68%
Triangle CofE VC Primary School	191	908,445	191	903,481	-4,965	-0.55%
Trinity Academy Grammar	931	6,772,976	931	6,746,258	-26,717	-0.39%
Trinity Academy, Halifax	1,605	10,648,015	1,605	10,562,697	-85,319	-0.80%

Tuel Lane Infant School	64	408,694	64	406,618	-2,075	-0.51%
Wainstalls School	203	899,201	203	899,201	0	0.00%
Walsden St Peter's CE (VC) Primary School	172	826,115	172	821,519	-4,596	-0.56%
Warley Road Primary Academy	451	2,316,835	451	2,298,006	-18,830	-0.81%
Warley Town School	140	687,641	140	684,106	-3,536	-0.51%
West Vale Primary School	123	680,321	123	675,766	-4,555	-0.67%
Whitehill Community Academy	628	2,912,355	628	2,889,450	-22,905	-0.79%
Withinfields Primary School	313	1,470,506	313	1,461,089	-9,418	-0.64%
Woodhouse Primary School	418	1,875,177	418	1,875,177	0	0.00%
Total	32,653	184,094,136	32,653	183,172,932	-921,204	-0.50%

Assumptions

Reduced attainment, deprivation to the lowest possible amount allowed and remainder taken from basic entitlement

Notes

20 Schools see no reduction due to being protected by MFG or minimum funding level

Report to Schools Forum

Meeting Date	22 June 2023
Subject	Changes to Early Years Funding in 23/24 and future provision
Report Author	Martyn Sharples

Report purpose
<ul style="list-style-type: none"> • To inform Schools Forum on the government's announcement of future changes to the early years and childcare entitlements funded through the Early Years Block of DSG. • To inform Schools Forum of planned changes to the hourly funding rates for the existing early education and childcare entitlement for 2, 3 & 4 year-olds paid to local authorities and schools and early years providers from September 2023. • To seek Schools Forum approval of additional centrally retained funding from the Early Years Block of DSG in 2023/24.

Need for consideration
Schools Forum to give a view on the proposed changes to the hourly funding rates paid to schools and early years providers from September 2023.

Need for decision
Schools Forum to approve the amount and purpose of additional centrally retained funds.

Contact Officers
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Report to Schools Forum

1) Background information and context

- i) The funding for the existing entitlements for 2,3 & 4 year olds, the Early Years Pupil Premium (EYPP) and the lump-sum payment for the Disabled Access Fund (DAF) are contained within the Early Years Block of the Dedicated Schools Grant (DSG).
- ii) At the Spending Review 2021, the Chancellor announced increases in the funding for the early years entitlements worth £160 million in 2022-23, £180 million in 2023-24 and £170 million in 2024-25, compared to 2021-22. This is for local authorities to increase the hourly rates paid to childcare providers for the government's funded childcare entitlement offers and reflects cost pressures, as well as anticipated changes in the number of eligible children. According to research published in November 2022 by the Institute for Fiscal Studies, the higher than expected inflation has eroded the value of the uplift and recent forecasts, at that time, suggested that the total real-terms funding for the free entitlement will be 8% lower in 2024/25 than it was in 2021/22.
- iii) On the 16th December 2022, the government confirmed the hourly funding rates to be paid to local authorities in 23/24. Also, it was confirmed that an additional £20 million, on top of the additional £180 million announced at the Spending Review 2021, had been put into the Early Years National Funding Formulae for 2023/24. The total indicative funding allocation for 2023/24 allocated to the Early Years Block across England was £3,927 million, at this time.
- iv) Further to our consultation with early years and childcare providers and having received confirmation of Calderdale's hourly funding rates, the Authority announced the hourly rates to be paid to schools and early years providers for the entitlements from 1 April, 2023. Following approval of the centrally retained funding by Schools Forum in February, budgets were set and the annual statutory indicative funding letters were sent out to all funded schools and providers, within the statutory timeframe.
- v) Over the past few years, we have regularly reported to Schools Forum that Early Years Providers have been subject to cost pressures, in particular the annual increases in the National Minimum Living Wage. It is a widely reported view that the government funding has not met the costs of delivering the early years entitlements for many years. The Private, Voluntary and Independent (PVI) sector has reported that additional unfunded demands during the Covid pandemic and current Covid Recovery periods, in addition to rising business costs, has constrained their ability to afford to recruit and retain a quality workforce. Recruitment and retention in early years and childcare is now at crisis point resulting in some providers limiting the number of places they can offer or, closing the provision. In a report to Schools Forum, submitted in January 2023, we reported that there was a real threat to the availability of sufficient places in Calderdale over the following 12 months, as further closures were predicted.
- vi) Despite these current concerns around national shortages of qualified staff and availability of places, in the Spring Budget in March 2023, the government

announced a range of new measures to help parents with childcare so they can return to work more easily.

The new measures include increasing childcare support so that, working parents in England will be able to access 30 hours of free childcare per week, for 38 weeks of the year, from when their child is 9 months old to when they start school.

This will be rolled out in stages:

- From April 2024, all working parents of 2 year olds can access 15 hours per week
- From September 2024, all working parents of children aged 9 months up to 3 years old can access 15 hours per week
- From September 2025, all working parents of children aged 9 months up to 3 years old can access 30 hours per week

vii) In addition to the £4.1 billion that the government will provide by 2027/28 to facilitate the expansion of the new entitlements, the government announced a substantial uplift to the hourly rate paid to providers to deliver the existing entitlements. The government will provide a further £204m of additional funding in 2023/24, to increase the hourly rates to providers from September 2023, on top of the additional £200m already confirmed for 2023/24, increasing to £288m by 2024/25.

viii) On the 31 May, 2023 the Government launched a consultation on proposed changes to the Early Years Foundation Stage framework to help manage the expansion of childcare entitlements.

[Early years foundation stage \(EYFS\): regulatory changes - Department for Education - Citizen Space](#)

A further consultation is planned over the Summer looking at proposals for the funding of the new entitlements which are due to commence in April 2024.

2) Main issues for Schools Forum

- i) At the time of writing this report, we have received no further information from the Department for Education, beyond the Spring Budget announcement, regarding the additional funding for the existing entitlements to early years and childcare. We are eagerly awaiting confirmation of how the funding will be paid to local authorities, the grant allocation and amended hourly rates for each local authority and the guidance around making changes to hourly funding rates paid to school and early years providers within a financial year.
- ii) Other than for the universal entitlement for all 3 and 4 year olds to early education, all of the other existing funded entitlements for eligible 2, 3 and 4 year

olds alongside the planned entitlements for 9 months to 3 year olds are subject to eligibility criteria and have to be administered as a benefit.

- iii) The Early Years and Childcare Sufficiency Team (EYCST) has overall responsibility for delivering many of the key duties in the Childcare Acts 2006 and 2016, including;
- lead responsibility for monitoring and paying the early education funding to early Years providers in Calderdale.
 - supporting the development of childcare places by providing up to date market management information to support business decisions.
 - the provision of an information service for families which it provides by telephone, face to face, online and using social media.
 - undertaking marketing campaigns throughout the year aimed at communicating details of local childcare and family services provision and the early education entitlements to parents.
- iv) Each term EYCST manages two headcounts, in addition to the Early Years Census, collecting data on every child's take-up of funded hours, checking their eligibility and raising payments to the school or provider. In the Summer Term 2023 there were about 4,200 children taking-up a funded entitlement. This number of children will increase significantly in April 2024 with eligible 2 year olds with working parents claiming their new entitlement and again in September 2025 due to eligible children from 9 months to 2 years old claiming for the first time.
- v) EYCST currently employs 1.0FTE Senior Officer, 2.6FTE Officers and 1.0FTE Business Support Officer. This does not provide adequate capacity to deal with the increase in the numbers of children claiming their entitlements, in addition to their existing duties. Enquiries from parents continue to grow following the Spring Budget announcement and will continue to grow as the stage implementation progresses. There is an identified need to recruit an additional 0.6FTE Officer that can be trained in the systems and processes to handle claims in preparation for 1 April 2024. Also, to provide accessible information for parents about the new entitlements and support schools and providers promote their offer, an additional budget of £5,000 is required for marketing costs.
- vi) Without the additional part-time officer and resources, we will not be prepared for or able to handle the increased numbers of claims within the terms of our contract and agreements with schools and providers.

3) Recommendations

- i) To centrally retain £30,000 from the further additional funding to cover the cost of a 0.6FTE Officer from 1 September 2023 to 31 March 2024 and a further £5,000 for marketing the extension to the entitlements in advance of the launch in April 2024, subject to guidance or conditions of grant from the Department of Education permitting central retention of funds from the further additional funding.

4) Reasons for recommendations

- i) The Government expects local authorities to fund central support services for Early Years and Childcare from the EY Block of DSG and this is reflected in the Finance Regulations. By funding these costs in this way, it brings Calderdale in-line with other local authorities and secures essential central services.
- ii) The Government is extending the funded entitlements from April 2024 to include eligible 2 year olds with working parents, we shall require additional capacity in EYCST in advance of the introduction of the new entitlement to complete training and dealt with the increase in enquiries due to the expansion. In addition, to help manage enquiries from parents, we shall require additional resources and changes to existing marketing materials.

5) Impact of funding, targets and milestones

6) Resource implications

7) Appendices