

Schools Forum

Date: 19 October 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)

Primary Head Teacher Substitute

Alice Leadbitter (Todmorden J, I & N)

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 6

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

John Eccleston (Warley Road Primary Academy)

Dan Burns (Old Earth Primary School)

Richard Horsfield (Brighouse High School)

Brian Robson (Brighouse High School)

Phillip Hannah (The Whitley AP Academy)

Academy Substitutes

Ivan Kuzio (Trinity MAT)

Roman Catholic

Brenda Monteith (Highbury School)

Church of England

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

Calderdale Federation of Education

Lisa Davies (National Education Union)

Staff Unions

Post 16 Representative

Karl Veltman (Calderdale College)

Early Years Representative x2

Denise Gwizdak (Pye Nest Day Nursery)

Andrea Dyson (Tot Spot Day Nursery)

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

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 22nd June 2023**
5. **Confirm if Debby Simpson is being allocated £2k (previously £1k) for Governor Support 23/24 due to increased workload**
Consultation / Decision
6. **School Forum Constitution 4 Academy Vacancies - a secondary headteacher, a secondary governor and 2 bursars, appoint another union rep**
Discussion
7. **Job description and verbal update on SRP**
Consultation
Richard Morse
8. **Growth Fund report**
Decision
Jane Davy
9. **Falling Rolls Fund report**
Decision
Jane Davy
10. **Proposed Schools Block Transfer report**
Decision
Jane Davy
David Graham
11. **Indicative School Funding 2024-25 report**
Consultation
Jane Davy
12. **Any Other Business**
Questions to be submitted a **minimum** 3 days prior to the meeting in writing to:
CalderdaleSchoolsForum@calderdale.gov.uk
Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair.
Chair

13. Future Dates

Paul Tinsley

25 January 2024

25 April 2024

All meetings will start at 4pm

Venue: virtual Teams Meeting

CALDERDALE SCHOOLS FORUM
22 June 2023 – Virtual Meeting Via Teams

PRESENT:

Tony Guise (Secondary Maintained) – Chair
John Eccleston (Academy)
Karen Morley (Academy) – Co Vice Chair
Phil Hannah (PRU)
Jo Buckley (Primary Maintained) – Co Vice Chair
Debbie Sweet (Special School)
Karl Veltman (Post 16 Representative)
Richard Horsfield (Secondary 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)
David Graham (QA and Complaints Consultant)
Steve Drake (Finance Officer)
Ian Hughes (Legal Officer)
Gill Poole (Unions)

APOLOGIES

Brenda Monteith (Roman Catholic)
Brian Robson (Brighthouse High School)
Adam McNichol (Primary Governors Maintained)
Gill Shirt (Secondary Governor Maintained)
Dan Burns (Academy Primary)
Desmond Deehan (Academy)
Mungo Shepherd (Primary Maintained)
Julie Kendall (Academy)

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

None.

2. Members Interests

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

Tony declared an interest in item 7 and item 9 as the Chair of Schools Forum and the Head Teacher of Calder Learning Trust.

3. Admission of the Public

None.

4. Minutes of the Schools Forum held on 23rd February 2023

Tony raised item 9 Allocation of the 2023/24 High Needs Block, regarding the Hub Model. Concern has been raised by Chris Lingard at Ravenscliffe and the plans around SEN hubs. A discussion has taken place between the Local Authority and her school but the offer for the whole model has not been progressed. Calder Learning Trust could create a hub but this will be capital investment.

Paul raised item 5 Admissions and School Rebuilding Programme. The posts have been discussed with a recommendation to look at costing. Richard is currently working on this and will come back to Schools Forum with more details.

John Q: is there an accurate report on concrete relating to school conditions?

Richard surveyed all maintained schools 2-3 years ago and no issues were highlighted.

5. Allocation of Funding to School Improvement Clusters (mid-term updates)

The allocation of funding no longer sits with the board but instead, the funding is allocated to school clusters for a more quality assurance approach. This is to help reduce inequalities and focus on children's emotional health and wellbeing. The clusters are grateful for the funding from Schools Forum to help them achieve valuable work and conduct training for good practice.

Tony Q: The Partnership Board is in deficit. What is being done to monitor this at cluster level? The end of year report is submitted to the Partnership Board including the March reports to monitor the spending. These showed that some clusters had surplus funding. Connie is meeting with clusters finance officers 4 times a year to identify priorities. Connie also liaises with Jane on how the money is being spent.

Phil Q: Is the cluster funding and the money distributed subject to a separate audit? We do not audit this. It is allocated to cluster officers and Head Teachers. The Partnership Framework will guide them in terms of procurement and audits.

6. Scheme for Financing Schools and National Funding Formula

There is no direct change, and the Local Authority will not be updating the scheme this financial year.

7. Final Balances and 3-year Budget Plans report

The overall level of balances in Calderdale's 52 maintained schools is £10.15 million which includes the cluster funding increase from the previous year. Two primary schools are currently in deficit and five schools are holding less than £40k. The Local Authority can hold schools to account for excessive balances for the year however, many schools hold this money for projects and recruitment. Appendix A shows closing balances at March 2023 and perspective at March 2024.

John expressed concern around the Local Authority and schools not being able to provide enough places for SEND children and the money is not being used for the children's benefit.

Jane advised that Head Teachers have put recruitment on hold as it is unknown if the pay award will increase from last September. Schools are not accounting for an increase and may have put a stop on building works. Currently 31 schools are projected to be in deficit by the end of year 3 / 4.

Tony highlighted that whilst the Calder Learning Trust has significant amount of surplus, all maintained schools had a condition survey which was subject to a School Rebuilding Programme. The funds are being maintained for worst case scenarios and Tony is challenging the DfE on salary increases for context.

8. Claw Back Report

A report can be provided if balances increase.

9. LA initial report on proposal to move 0.5% from schools block to High Needs Block report

Tony shared the questions provided by Debbie with members. The report is to be brought to the Schools Forum in the autumn term as it is required to consult with schools. Paul is attending CPHA and CASH to discuss this further and a formal consultation is needed. Feedback will be gathered in a report for autumn term. Schools Forum members will vote on this and if the outcome is not voted in favour, there is a further opportunity to take to the Secretary of State. Previously, there was an underspend of the High Needs Block but the report shows where the pressures are as of today. Jane and Steve discussed that out of authority placements are causing an overspend and even though Early Years and the Specialist Inclusion team are heavily resourced, overspending is still occurring which highlights the level of demand.

When comparing the High Needs Block in other authorities, they are overspending as high as £30/40 million. The Local Authority will need to send a return to ESFA to show a balanced book in terms of the High Needs Block. Steve is leading on submission of the balanced book and LA Officers are to agree a recovery plan before the transfer of funds. Paul will pick this up with Steve as members could put forward they would prefer the Local Authority to overspend on the High Needs Block. Jane and Steve will consult on this over the summer break.

Q: Do we receive contributions or can the Health and Care budget go towards the cost of places? Yes, we are working closely with Social Care. The care elements are paid for from their budgets.

Q Tony: Can we increase those contributions? The Local Authority currently has few children in residential placements, David will collate the numbers and provide figures. Going forward he wants to work alongside health and focus on their contribution to continuing health care concentrating on budgets and placements.

Q John: Should the consultation be put to Governors so that they remain in the loop? Paul agreed that it would be important to consult with Governors and anyone else affected. Steve will be meeting with David and Alex to bring together the finance for the DSG recovery plan to be able to start consulting in early July.

Q: If the consultation is to take place from early July, are you taking into account the school holidays because it doesn't seem fair to speak to governing bodies first and schools to be consulted after? The formal consultation starts in September with feedback to be brought to the Autumn meeting. Discussions around this can start today rather than at the formal consultation.

Debbie submitted her questions to the Chair relating to Item 9. These are to be shared with Local Authority Officers.

1. Para 2a) What was the increased spending on the specialist inclusion team and why was there an increase? What impact measures are in place for the services provided by this team- i.e how can we prove value added?
2. Para 2c) what is the cost of suspended pupils Vs permanently excluded pupils? How effective is the provision being made given the significant increase in the number of suspended pupils from 2019/20- 2022/23? Is there a strategic plan to address this and therefore reduce the costs?
3. Para 2e) (i) The number stated for increase in places at Highbury for September 2023 are nowhere near correct. Why are only the increase in reception places stated, there are increases across most year groups and there is an expansion of

the satellite provisions attached to Highbury at KS1 and 2 creating an additional 20 places? What confidence does this give forum that there is accurate data being recorded and acted upon? LA officers to ensure schools are consulted what actual numbers are and SF have a clear idea for consultation

4. Para 2d) The increased funding to support children in the early years; how effective is this given that it is not impacting on the number of requests for early years places, in fact they are continuing to rise? Martin to look at the Early Years funding.
5. Para 2e) How many out of authority places are there in total and what is the gap in need that they are addressing? Are the places ever reviewed? Is there clear success and exit criteria? There is the issue around the absence of alternative provision and lack of support and resources for secondary schools. More options are needed due to not being enough places.
6. How is this proposal linked to the planned review of funding to mainstream schools, especially where numbers of children with EHCP's is significantly above the average?

David has responded to Debbie to work with her on the questions in regard to SEND. David will be formulating the budget for next year and the increase in demand across the board. He is currently looking at Calderdale's Local Offer with Paul. He highlighted that the projects for this year and next are to be as robust as possible. The independent maintained placements have a duty of care for children in these provisions. David will come back with further details of proposals.

Debbie agrees that services are feeling a pressure and that there is the need to evolve. The issues around funding needs to be analysed and a systemic change to be implemented. It would be beneficial to link up with other services and health colleagues.

Paul agreed with a whole education systemic review as there is a need for change around how we support schools and how to work as a community in terms of SEND. School staff being trained must be addressed with a look to upskilling staff in mainstream schools resulting in all staff being at similar level in terms of challenges.

There is currently a high number of permanent exclusions, some schools higher than others which Paul is taking to CPHA and CASH conference. Paul needs to speak to schools before commissioning new places at the Alternative Provision and the Local Authority needs to support with intervention and engagement places to help reduce the number of Permanent Exclusions.

Q Tony: What support is there for schools who have vulnerable children other than the TWAPA? Evidently, there needs to be a broader conversation around this. The Hub Model is there to help support staff currently.

Debbie raised the point of there being too much pressure on SENCo's and for there to be specialist teachers in school. The DfE approved a proposal from Highbury Special School to support schools to create a specialist teacher role.

Phil confirmed the support around prevention placements has been agreed with Paul for potentially the whole year. His KS2 will be locating to another site to help support Primary pupils. Paul is looking at commissioning a nurture provision for those pupils at risk of permanent exclusion. Karl has drafted a reconnect offer to support those disengaging pupils and to help them transition back into school. There is the Princes Trust Team at college to help deliver with ASD element and Karl will share this at the CASH conference.

David discussed the Early Years initiative and Dingley's promise to upscale their workforce. It will be a whole system support, looking at additional capacity through the Hub Model with a nurture hub as an additional provision for ASD pupils. It is the first time this year that a forecast for a specialist resource provision has been through the SCAP return. By next Schools Forum, he will have the planning document to address capital planning. To ensure effectiveness there needs to be a system wide approach.

Paul feels there is a need to invest up front now to make savings later to help provide more capacity in the Local Authority, which can help save money on placing pupils elsewhere. Pressures on High Needs Block feels right to do to be able to invest in the most vulnerable young people and for a cultural change.

Tony as Chair thanked Local Authority officers for the reports submitted for this meeting and being concise and to the point.

10. Forum Constitution and Terms of Office

Ian made sure this is valid and fit for purpose. He will check we have a balance between Head Teacher and School Forum members. Tony as Chair thanked members for being prepared and challenging issues where needed.

11. Self-Assessment Feedback

Another may be coming up at the end of this year.

12. Changes to Early Years Funding in 23/24 and future provision report

Martyn discussed the purpose of the report is to inform members of the government's announcement of the Spring budget, but no update has been provided beyond this.

There are planned changes for hourly funding rates being paid to Local Authorities and schools from September 2023. There will be more information and a consultation for future funding of new entitlements by the end of Summer. The DfE are proposing to provide local authorities with additional funds and grant early years a supplementary grant. There are no formal requirements to consult on the hourly rate however, we can anticipate in the memorandum, Local Authorities' will be directed to pass on the increase in funding to providers.

Ultimately there will be more work for local authorities to complete checks on children to confirm their eligibility and to ensure payments are appropriate. Martyn is hoping to recruit to oversee this role for the marketing as requesting from the fully retained funding is no longer the case. It is now requested from this year's DSG as advised from DfE.

Q Karen: Is the recommendation no longer the case?

Yes, it is confirmed that this is no longer the case. It is anticipated that we would centrally retain additional funds to build capacity to administrate the new entitlements from April 2024. This funding is intended for existing entitlements not the new entitlements and the proposed additional capacity is for future entitlements. The grant memorandum is expected to restrict the grant to be exclusively used to increase the hourly rate of existing entitlements.

13. Addendum to the Admissions and Schools Rebuilding Programme; outlining what each new role will cost

Richard discussed how the School Rebuilding Programme is evolving. Some school sites in the programme are not suitable for a rebuild but other sites are to be secured. There is a skill set outlined for a staff member to support the change as they will need to be able to write cabinet papers, consultations and responses as appropriate. Richard will update Schools Forum with a job description. He also commented that the Fair Access Panels are going well with support from the new Officer.

We will need to build a temporary school while some sites are re-developed and a modular will need to be retained in order to be focused on schools that are more in need. 12 schools are named in the program but there is possibility to bring in other schools to be part of consolidation to maximise on what to get out of the programme. Ward members are to be consulted before this is taken forward.

Q John: Will primary and secondary head teachers be made aware that this is taken on board in terms of conclusions? We have to have local consultation. The formal consultation will start with ward members and schools will be part of proposals.

14. National Funding Formula and falling rolls – initial feedback and verbal update

Jane discussed the consultation outcome in April and the national funding formula with local elements. The ESFA will confirm funding in July. Jane has written to the five schools regarding the impact of the split site funding. For growth funding, the minimum is a basic entitlement of £2k for primary and £3k for secondary however, Calderdale fund above this. The Local Authority will have to wait for the guidance to determine if this has any impact on funding. Falling rolls is changing to target all schools. Jane will have to use the SCAT data to determine eligibility for the funding and she will feedback the effects of the consultation at the next Schools Forum.

15. Any Other Business

Questions to be submitted a **minimum** 3 days prior to the meeting in writing to:
CalderdaleSchoolsForum@calderdale.gov.uk

Questions will only be permitted if relevant to the business of the Forum and at the discretion of the Forum Chair.

16. Future Dates

19 October 2023

11 January 2024

25 April 2024

All meetings will start at 4pm

Venue: virtual Teams Meeting

Report to Schools Forum

Meeting Date	19 October 2023
Subject	Growth Fund
Report Author	Jane Davy

Report purpose

- 1) To provide members of Schools Forum with a report on how the Growth Fund has been allocated to schools in 2022-23, the expected expenditure for 2023-24 and to agree the amount of DSG (schools block) to be retained for this purpose in 2024-25.

Contact Officers

Jane Davy-Acting Team Leader LMS Team
01422 393543
Jane.davy@calderdale.gov.uk

Report to Schools Forum

1. Background information and context

- a) From 2024 to 2025 it is mandatory for local authorities to provide growth funding where a school or academy has agreed with the local authority to provide an extra class to meet basic need in the area (either as a bulge class or as an ongoing commitment).
- b) Calderdale have operated a growth fund for several years and are currently following the operational guidance on growth funding. For clarity the minimum a Local Authority has to fund is £1,550 x number of pupils x ACA for primaries and £2,320 x number of pupils x ACA for secondary schools , Calderdale fund at the current AWPU value which is significantly higher than the minimum required. Therefore, it is proposed to not make any changes to Calderdale's growth fund.
- c) 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).
- d) In June 2021, after consultation with schools a revised criteria was agreed for Growth and was implemented from April 2022, see Appendix 2,
- e) For 2022-23 and 2023-24 Schools Forum agreed the Growth Fund should be set at £580.5k and zero respectively. Any under/overspends would be carried forward to 2024-25.

2. Main issues for Schools Forum

Need for consideration

- a) For the academic year 2022-23 the Local Authority agreed an expansion of pupil numbers and a Growth Fund allocation for the following schools: Copley Primary (half a form), Calder Learning Trust (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)

- b) The final allocations made from the Growth Fund for the 2022-23 financial years totalled £946,119 leaving a surplus of £226,547 (after receipt of £453k from the ESFA for the academies). Original forecast reported to School Forum in November 2022 was for a surplus of £175k a difference of £51k is due to a reduction of numbers required at Brooksbank (£38k) and Calder Learning Trust (£13k).
- c) The allocations made from the Growth Fund for 2022/23, and the estimated continued allocations for future years for these schools are shown in Appendix 3. From Sept 2023 the Adults and Children's Schools Reorganisation Team has advised that the following schools/academies will continue to receive funding for 24/25; Copley, Brooksbank and Ryburn Valley High.
- d) Based on the above projected commitments there will be a surplus within the Growth Fund for 2023/24 estimated at £23k which, School Forum are asked to approve to carry forward to 2024/25.
- e) A Table showing the above allocations can be found at Appendix 3.
- f) Growth funding is allocated to local authorities using a formulaic method based on lagged growth data. After applying the data to the ESFA calculator it is estimated that Calderdale will receive Growth Funding of approx. £270k. The LA is requesting that the £72,886 brought forward from 23/24 falling rolls fund and the £23k from the growth fund along with £113k from this year growth allocation is retained for 24/25 growth. Any surplus growth fund, currently estimated at £157k is either transferred to the High Needs Block or the Schools Block depending on the outcome of the School Forum vote on the transfer of funding from Schools Block to High Needs Block. 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.

3. Recommendations

- a) Schools Forum notes the Growth Fund allocations for 2022-23.
- b) Schools Forum notes the estimated expenditure for 2023-24 and the amount to carry forward 2024-25.
- c) Schools Forum agrees in principle to retain £113k growth fund allocated in the schools block DSG (Schools Block) for the 2024-25 Growth Fund. Current funding estimate required is £186k for growth and nothing for falling rolls. A report will be brought to the January School Forum detailing the exact amounts required.
- d) Schools Forum agrees in principle to use any surplus growth fund to be either transferred to the Schools or High Needs Blocks depending on the outcome of the agenda item 10.

4. 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.

5. 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).

6. Resource implications

Funding should be met from the 24/25 schools block growth allocation. The exact amount will not be known until mid December 2023 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.

7. 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.

Appendix 2

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 2023 will be funded from September 2023 to March 2024 (7/12ths) in maintained schools and from September 2023 to August 2024 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 2023 values) was £3,390.60 for primary and £4,778.25 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 (7/12ths) as a lump sum in the January SOF payment, academies will receive two payments 7/12th in January SOF payment and 5/12th 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.

Appendix 3

Growth Fund Summary				
	Actual	Actual	Estimate	Estimate
School	2021/22	2022/23	2023/24	2024/25
Copley	30,492	29,702	28,204	31,479
Calder Learning Trust	91,327	66,238		
<i>Rastrick Academy</i>	274,750	251,110	85,163	
<i>Trinity Grammar</i>	162,927	195,862	56,775	
<i>Trinity Academy Halifax</i>	168,827	152,369	56,775	
<i>Brooksbank</i>	76,351	33,428	41,897	74,314
<i>Ryburn</i>	257,387	217,411	210,854	222,942
Total Annual Cost	1,062,061	946,119	479,668	328,735
Budget	500,000	580,586	0	185,886
refund from EFA re Academy Schools	306,387	452,754	276,306	119,706
overspend/underspend	-255,674	87,221	-203,362	-23,143
Projected Cumulative overspend	139,326	226,547	23,185	42
N.B.				
All estimated calculations based 2024-25 proposed Formula				
Pupils numbers provided by Capital and Access Team and will be subject to change				

Report to Schools Forum

Meeting Date	19 October 23
Subject	Falling Rolls Fund
Report Author	Jane Davy

Report purpose

To provide members of Schools Forum with report on the amount of Falling Rolls fund expended in 22/23. Inform members of the new mandatory criteria for falling rolls fund and to agree the amount to be retained from the growth fund/falling rolls fund element of the schools block DSG for 2024-2025.

Need for Decision

For School Forum to agree the amount to be retained for the Falling Rolls Fund.

Contact Officers

Jane Davy-Finance Manager LMS Team
01422 393543
Jane.davy@calderdale.gov.uk

Report to Schools Forum

1. Background information and context

In Summer 2022, the Government consulted on its intention to fund falling rolls from 24/25 onwards. In July 2023 the operational school funding guidance sets out how this should be administered at Local Authority level. Although local authorities will continue to have discretion over some of the criteria and whether to operate a falling rolls fund, they can only provide funding where school capacity data 2022 (SCAP) shows that school places will be required in the subsequent three to five years. In addition, the requirement that schools must be Ofsted rated “good” or “outstanding” to be eligible for falling rolls funding will no longer apply.

Calderdale have operated a falling rolls fund from April 2022 and will apply the mandatory changes to the eligibility criteria see Appendix 1 for revised criteria.

2. Main issues for Schools Forum

Need for consideration

- a) For the 23/24 eligibility, LA officers have used the data from the Oct 22 census to assess the eligibility and calculate the amount required. The following schools were allocated falling rolls funding;

- Christ Church Sowerby Bridge- £36,774
- Old Town-£25,813
- Tuel Lane-£17,680

Total funding allocated £80,267

At the schools forum meeting in January 23 it was estimated that £140,974 would be required, the reasons for difference (£61k) are as follows;

- Cornholme- hold balances above £60k (£42K)
- Norland- hold balances above £60k (£19k)

School Forum agreed to retain £146,607 from the growth fund element of the 23/24 schools block DSG plus £6,545 brought forward from 22/23. This now leaves £72,886 to carry forward to 24/25.

- b) Data has been provided by the LA's Schools Organisation and Planning section in August 23 this has been used to estimate the funding from the

ESFA and apply to the LA's criteria to estimate which schools will be eligible.

- c) After applying the data to the ESFA calculator it is estimated that Calderdale will not be eligible for falling rolls fund for 24/25.
- d) After applying the data to Calderdale's falling rolls criteria it is estimated that 11 primary schools meet the criteria 1-5 listed in Appendix A. However, none of those schools meet criteria 6 i.e. the data does not show that any school will not increase places in the next three years.
- e) Based on the above NO funding will be required to fund falling rolls for 2024/2025 (although actual pupil numbers will change the SCAP data won't and therefore no school will be eligible).
- f) Forum members are asked to vote to use the carry forward from 2022/23 of £72,886 for growth funding.

3. Recommendations

- a) Schools Forum notes the actual falling rolls expenditure for 2023/24
- b) Schools Forum notes that no funding is required for 2024/25
- c) Schools Forum members vote to use the carry forward of £72,886 from 2023/24 be used for the Growth Fund for 24/25.

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 all schools and academies with falling pre-16 pupils numbers to maintain a good or outstanding quality of education until pupil numbers recover.

6. Resource implications

Funding should be met from the 2024/25 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 pupil numbers recover.

Appendix A

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. Only schools with fewer than 420 pupils will be considered for the falling rolls fund.
2. Schools receiving growth funding are excluded.
3. 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.
4. The drop in NOR is not a result of a bulge class leaving the school.
5. 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).
6. 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.

7. 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.

The minimum funding guarantee (MFG) and sparsity funding will be deducted from the additional funding.

Report to Schools Forum

Meeting Date	19 th October 2023
Subject	Proposed Schools Block Transfer 2024-25
Report Author	Paul Tinsley – Interim Assistant Director Education and Inclusion Jane Davy – Finance Manager LMS Alexander Webley – Interim Head of SEND David Graham – Interim SEND and Inclusion Service Manager

Report purpose

The purpose of this report is to set out the proposal to transfer 0.5% (indicative £979K) of the school's block of the Dedicated Schools Grant to the High Needs Block in 2024 -2025

Need for decision

To note the indicative allocations of the Dedicated Schools Grant as detailed in this report.
To approve a transfer of 0.5% from the Schools Block to the High Needs Block.

Contact Officers

Paul Tinsley – Interim Assistant Director Education and Inclusion

Paul.tinsley@calderdale.gov.uk

Alexander Webley – Interim Head of SEND Alex.webley@calderdale.gov.uk

David Graham – Interim SEND and Inclusion Service Manager

David.Graham2@calderdale.gov.uk

Jane Davy – Finance Manager LMS Jane.Davy@calderdale.gov.uk

Report to Schools Forum

1. Background information and context

- 1.1** Prior to 2018/19 local authorities had full flexibility to transfer funding between blocks, this had largely been from Schools to High Needs. However, the 2018/19 school funding reforms saw the introduction of the National Funding Formula (NFF) for schools and High Needs. The Department for Education (DfE) limited the ability to transfer funding from the Schools Block to High Needs.
- 1.2** Since 2018/19 local authorities have been able to transfer up to 0.5% of the Schools Block to High Needs following the approval of the Schools Forum. Should the Schools Forum not approve a transfer, approval can be sought from the Secretary of State. Furthermore, a transfer of greater than 0.5% of the Schools Block can only be made with the approval of the Secretary of State.
- 1.3** There are no restrictions on transfers between other blocks. Approval for a transfer is only for the year it is enacted; further approvals are required annually.
- 1.4** Calderdale have managed the high needs pressures within the budget. However, for the first time in 2022-23, the high needs block was in deficit by £868k, with a projected deficit of £5.067million for 2023-24 (cumulative deficit of £5.935m) reasons for this are detailed below.
- 1.5** An increasing number of local authorities have successfully requested transfers from Schools Block to HNB over the past few years, in Calderdale we have not previously needed to make such a request. However, with mounting pressures on the HNB due to exponential increases in EHCP's and permanent exclusions we find ourselves now having to join this list of local authorities (see Appendix 2 for details)

2. Schools Block Funding

- 2.1** Calderdale already provide schools notional SEN through their Individual School Budgets this is currently at 12.2% of the Schools Block DSG, 2.2% above the national average.
- 2.2** The schools block is ring-fenced in 2024 to 2025, however local authorities can transfer up to and including 0.5% of their school's block funding into another block, with the approval of their Schools Forum. Without Schools Forum agreement, or where they wish to transfer more than 0.5% of their school's block funding into one or more other blocks, local authorities must submit a disapplication request to the Secretary of State.

- 2.3** The indicative funding has been announced for 24-25 in July 23, based on October 22 data, Calderdale will receive 195.7m an increase of £5.6m from the previous year, in addition Calderdale schools and academies will receive a further £3.2m for teachers pay grant.
- 2.4** Based on the indicative funding data, 0.5% equates to £979K. Initial modelling on Oct 22 data, using the NFF values leaves a surplus of £633k to allocate, this can be found in Appendix 1.
- 2.5** This would leave £346k to be funded from the schools block, the LA propose to reduce the following factors in the order listed to fund the block transfer.
1. Lower Prior Attainment
 2. Free School Meals
 3. Free School Meals Ever 6
 4. Basic Entitlement

The reasoning behind this is because the above factors are used in the notional SEN calculation Lower Prior Attainment being the highest % factor used followed by FSM, FSM6 and finally Basic Entitlement. Modelling of reducing these factors on October 22 data showed only the first two factors would be reduced and the impact of this can be found at Appendix 1. These are only indicative figures and will change once Oct 23 data has been received.

Growth and Falling Rolls

- 2.6** Calderdale will receive funding for growth and falling rolls, the amount is not known at this time, and it is uncertain what call the LA would need on this funding to meet its statutory duties. However, if there is a surplus funding this could be used towards the 0.5% transfer to the High Needs.

3. High Needs – Rationale for request

The demand for support from High Needs continues to grow as evidenced by the growth in request for EHCP assessments (Figure 1) and EHCP's issued (Figure 2). Given the continued rise, it is likely that the trend for EHC requests is likely to continue next year.

Figure 1: Total New EHC Requests

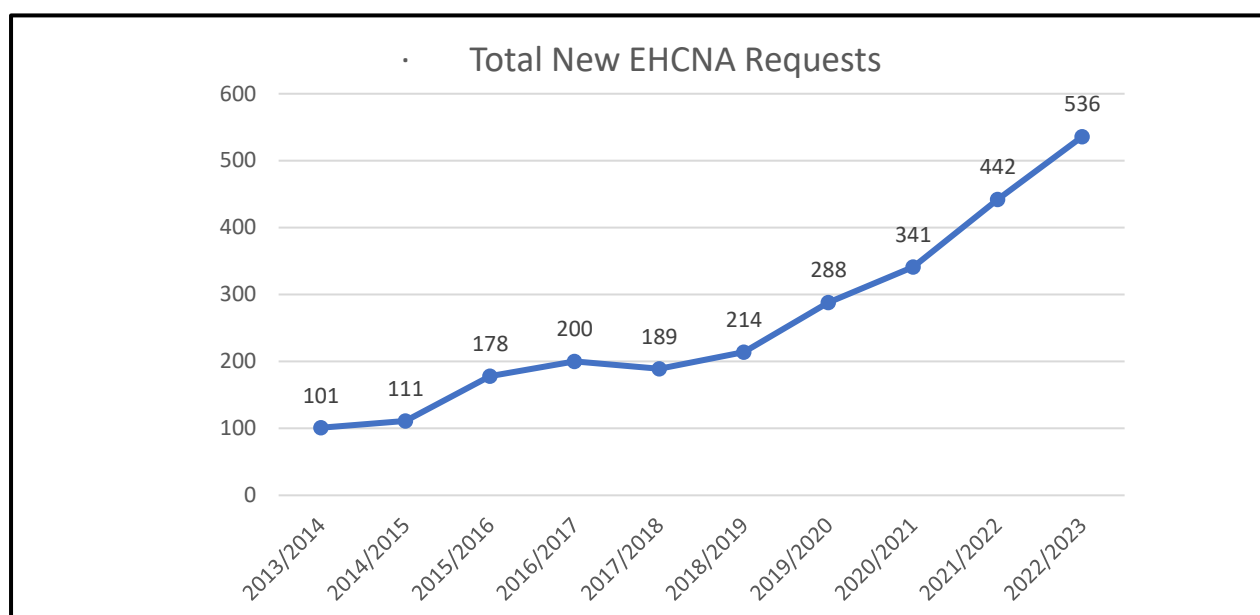
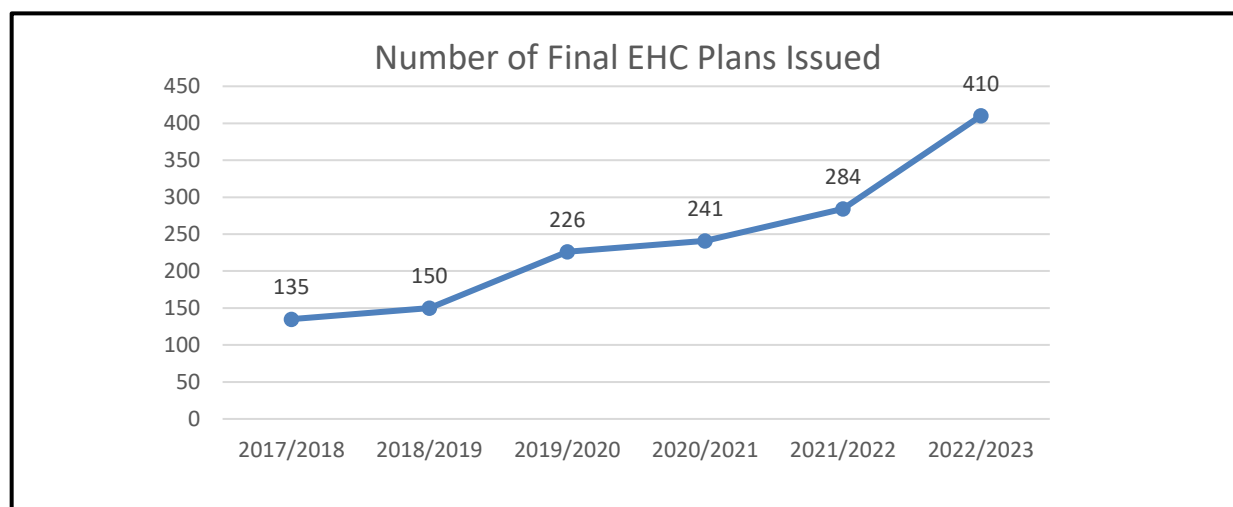


Figure 2: Number of Final EHC Plans Issued



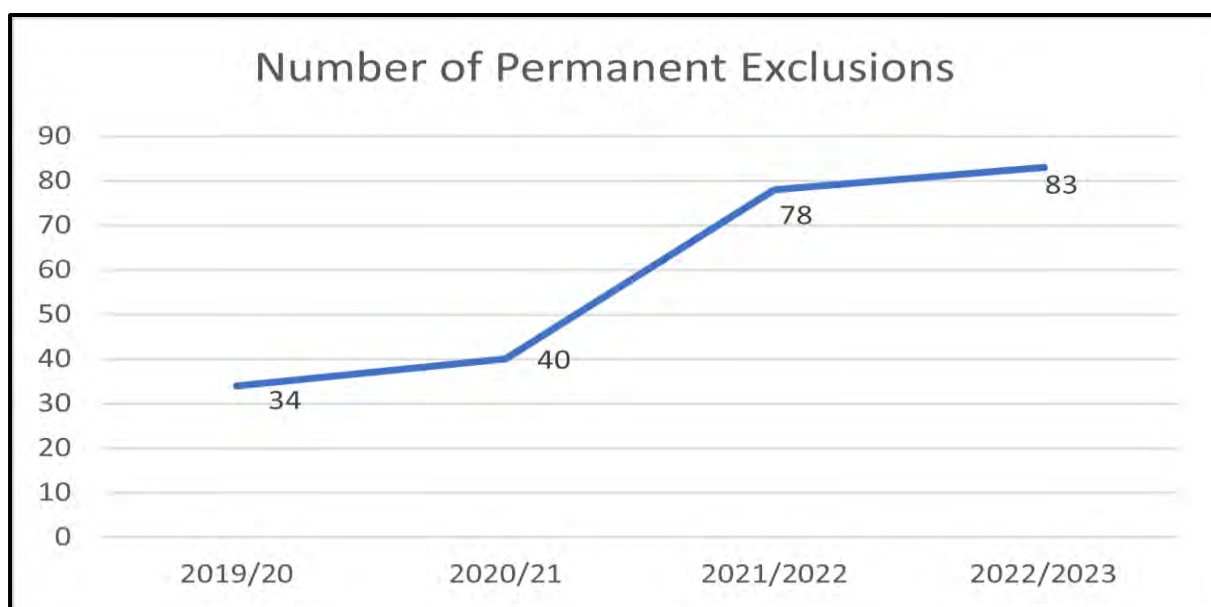
- 3.1** Other than numbers of children supported, the other key driver for cost is the package of support need for each child and young person.
- 3.2** In 2021-22 a high proportion (43.8%) of SEND learners with EHCP's were placed in LA maintained schools and mainstream provision. This compares to a national average of 37.7% (excluding resourced units).

- 3.3** 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
- 3.4** 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 be 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.
- 3.5** Increase in Special School Places- Special school places have been steadily increasing over the last 5 years.
- 3.6** 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. Placements are likely to increase.
- 3.7** The use of independent settings is driven by a lack of appropriate provision in the local area, parental preference and mainstream settings stating they are unable to meet need following consultation or annual review.

Exclusions

- 3.8** The DfE requires the Council to identify where costs may be being passed from the Schools to High Needs, and the DfE specifically references exclusions. Exclusions continue to rise as evidenced in the data highlighted below.

Figure 3: Permanent Exclusions



- 3.9** There has been a marked increase in the number of pupils excluded, leading to the need to find and fund alternative provision. This results in additional pressure placed on the High Needs Budget
- 3.10** 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
- 3.11** The increase in spend is caused by rising demand, need and expectations alongside continued and sustained pressure on resources.

4. Managing High Needs expenditure

- 4.1** To manage High Needs expenditure, the Local Authority has and will continue to support new initiatives, including increased places at special schools and the development of new SEND Hubs and resource bases. Additionally, the LA will seek to:
- Address the increasing overspend across the High Need Block

- Manage demand for provision through multi-agency early intervention and co-production.
- Support children and young people to access local provision.
- Ensure sufficient supply of SEND provision through expansion of resource bases and increased special school places.
- Continue to improve the internal processes and systems supporting the statutory assessment process, which determine the majority of High Needs Block spend.
- continue to closely monitor contracts for independent provisions to ensure they are cost effective, adequately meet needs and continue to offer good value.
- Review our direct payments and personal budgets to ensure that they meet the needs of Children and young people and there is sufficient information and support for schools, practitioners and parents.

- 4.2** Calderdale are a participating LA involved in the White Rose Partnership, working collaboratively with regional partners to commission a single contract for education, or education and residential care, for children and young people with SEND. Through this regional SEND arrangement, participating authorities procure education with or without residential care for children and young people where these arrangements are provided by external Contractors. It is anticipated that through this arrangement Contractors will support the ability to manage fluctuations in demand and generate capacity across the participating member authorities.
- 4.3** The LA are taking proactive steps to enhance the educational infrastructure within the local area by initiating comprehensive capacity and feasibility studies on schools and surrounding areas. This will allow the optimal utilisation of existing school facilities, the assessment of potential expansion requirements, and evaluations on the impact on surrounding neighbourhoods. These informed decisions will not only address the current educational demands but also ensure suitable sustainable growth and development.
- 4.4** The LA have been selected to take part in the SEND and AP Change Programme arranged by the DFE. This will be a key event to present a voice for change within the SEND and AP system, providing better outcomes for children and their families.
- 4.5** Calderdale are required to publish a DSG recovery plan which will be shared with Schools Forum members and will provide regular feedback and the opportunity for the HNBRG (to include school representatives) to shape and monitor the plan.
- 4.6** No single action alone will be sufficient to mitigate the existing deficit, this will only be addressed through a combination of interventions. A longer-term

financial management plan to recover the deficit, using the ESFA recommended deficit management plan template, has been developed that is consistent with the actions and objectives outlined above.

- 4.7** If a transfer from the Schools Block is supported, it will be earmarked to support High Needs provision in schools rather than be used to reduce the High Needs deficit. Future developments will consist of SEND Working groups which will feature school Leader representatives.

5. Consultation with Schools, Governors, Trustees and other Interested parties

- 5.1** In accordance with the school funding operational guidance the LA consulted with stakeholders on the above. The consultation ran from Friday 9th September to Friday 30th September 2023. The consultation asked three questions.

- Q1, Do you support a transfer of funding of funding from the School Block to the High Needs Block for 2024-2025?
- Q2, Do you support the full transfer of 0.5% or £979k based upon indicative funding data?
- Q3 If you do support the transfer, do you agree with funding the 0.5% firstly from any surplus funding after following the NFF, secondly and surplus funding from Growth or Falling Rolls Fund and finally from the individual school budget share as set out above?
- There was an opportunity for stakeholders to comment on the proposals.

- 5.2** The consultation received 33 responses, a summary of the responses is below, Appendix 3 shows all the results and comments.

- Q1 33 responses 12 in favour, 20 against, 1 don't know.
- Q2 30 responses 11 in favour, 18 against, 1 don't know (3 didn't answer this question)
- Q3 20 responses 10 in favour, 9 against, 1 don't know, (13 didn't answer this question).

School Forum members will be asked to vote on the proposal, if members vote Yes, they will be asked on the preferred methodology of calculation of the transfer as set out in the consultation. If School Forum members vote No, LA officers will report back to Council leaders and ask for a decision on whether to submit a request to the Secretary of State to disapply the decision of School Forum on this occasion.

6. Recommendations

1. School Forum members are asked to consider the result of the consultation and vote on the proposal to move 0.5% of Schools Block to the High Needs Block
2. If members vote Yes, do they agree with the methodology of the calculation of the transfer of funding.
3. If members vote NO, to note that LA officers will seek a decision from Council Leaders on applying to the Secretary of State for a disapplication of School Forum Vote. LA Officers will report back to Forum members of the Council decision, by email, as soon as it is known.

Appendix 1

School Name	Pupil Numbers	2023/24 Actual	2024/25 with NFF values	Difference between 23/24 & 24/25	2024/25 with 0.5% transfer	Difference between 23/24 & 24/25	Difference between NFF values and 0.5% trf
Abbey Park Academy	197	1,059,864	1,124,386	64,522	1,121,603	61,738	-2,783
All Saints' CofE Primary School	212	937,253	990,701	53,449	990,701	53,449	0
Ash Green Community Primary School	404	2,290,166	2,486,342	196,176	2,478,486	188,319	-7,856
Bailiffe Bridge Junior and Infant School	198	916,013	971,643	55,630	969,944	53,932	-1,698
Barkisland CofE VA Primary School	194	857,782	906,703	48,921	906,703	48,921	0
Beech Hill School	461	2,519,039	2,608,506	89,467	2,608,506	89,467	0
Bolton Brow Primary Academy	210	964,673	1,023,328	58,654	1,021,562	56,889	-1,765
Bowling Green Academy	145	708,894	752,352	43,458	750,950	42,056	-1,402
Bradshaw Primary School	331	1,463,363	1,547,147	83,784	1,546,141	82,779	-1,005
Brighouse High School	1,032	6,288,431	6,678,680	390,249	6,666,119	377,689	-12,561
Burnley Road Academy	180	880,550	933,965	53,415	932,039	51,489	-1,926
Carr Green Primary School	312	1,446,744	1,528,213	81,470	1,524,794	78,050	-3,420
Castle Hill Primary School	182	882,777	937,352	54,575	935,595	52,818	-1,757
Central Street Infant and Nursery School	59	377,598	395,966	18,368	395,172	17,574	-794
Christ Church CofE VA Junior School, Sowerby Bridge	110	618,570	656,608	38,038	655,065	36,496	-1,542
Christ Church Pellon CofE VC Primary School	168	978,173	1,035,818	57,645	1,032,851	54,679	-2,967
Cliffe Hill Community Primary School	169	953,540	1,008,304	54,764	1,005,693	52,153	-2,611
Colden Junior and Infant School	77	477,747	508,117	30,370	507,630	29,883	-487
Copley Primary School	289	1,310,211	1,387,627	77,416	1,387,627	77,416	0
Cornholme Junior, Infant and Nursery School	148	832,175	883,726	51,551	881,182	49,008	-2,543
Cross Lane Primary and Nursery School	305	1,546,479	1,642,275	95,796	1,637,714	91,236	-4,561

Dean Field Community Primary School	199	1,116,123	1,185,009	68,886	1,181,878	65,755	-3,131
Elland Church of England (Voluntary Aided) J, I and N School	160	974,185	1,034,095	59,910	1,030,765	56,580	-3,329
Ferney Lee Primary School	181	1,021,429	1,085,066	63,638	1,081,854	60,426	-3,212
Field Lane Primary School	99	631,298	670,825	39,526	668,646	37,348	-2,178
Hebden Royd CofE VA Primary School	92	479,434	508,593	29,159	507,920	28,485	-674
Heptonstall Junior Infant and Nursery School	67	396,781	409,744	12,963	409,378	12,597	-366
Holy Trinity Primary School, A Church of England Academy	351	1,710,417	1,811,982	101,565	1,807,704	97,286	-4,279
Holywell Green Primary School	166	835,877	888,366	52,488	886,602	50,724	-1,764
Lee Mount Primary School	307	1,661,046	1,741,434	80,387	1,735,890	74,843	-5,544
Lightcliffe Academy	977	6,245,499	6,627,501	382,002	6,613,085	367,586	-14,416
Lightcliffe C of E Primary School	414	1,829,097	1,933,621	104,524	1,933,621	104,524	0
Ling Bob Junior, Infant and Nursery School	306	1,695,584	1,800,688	105,104	1,794,447	98,863	-6,241
Longroyde Primary School	374	1,707,755	1,884,676	176,920	1,881,125	173,370	-3,551
Luddenden CofE School	100	594,010	632,680	38,670	631,140	37,130	-1,540
Luddendenfoot Academy	191	850,535	902,594	52,060	901,537	51,003	-1,057
Midgley School	95	509,297	540,352	31,056	539,422	30,125	-930
Moorside Community Primary School	207	1,207,198	1,290,569	83,370	1,287,021	79,823	-3,547
Mount Pellon Primary Academy	294	1,599,347	1,667,458	68,111	1,663,255	63,908	-4,203
New Road Primary School	162	860,271	912,807	52,536	910,547	50,277	-2,260
Norland CE School	76	432,050	458,113	26,063	457,570	25,520	-543
Northowram Primary School	405	1,821,401	1,924,955	103,554	1,924,955	103,554	0
Old Earth Primary School	412	1,840,501	1,948,925	108,424	1,944,712	104,211	-4,213
Old Town Primary School	71	403,702	429,124	25,421	428,674	24,972	-449
Park Lane Academy	449	3,499,573	3,727,117	227,544	3,716,891	217,317	-10,227
Parkinson Lane Community Primary School	524	2,793,036	2,952,495	159,459	2,941,383	148,347	-11,112

Rastrick High School	1,743	10,437,870	11,086,369	648,499	11,067,356	629,486	-19,013
Ripponden Junior and Infant School	195	922,628	976,456	53,828	974,247	51,619	-2,209
Riverside Junior School	143	700,592	745,172	44,580	743,980	43,388	-1,193
Ryburn Valley High School	1,383	8,608,235	9,162,023	553,788	9,145,587	537,351	-16,436
Sacred Heart Catholic Voluntary Academy	192	985,916	1,047,658	61,742	1,045,001	59,085	-2,657
Salterhebble Junior and Infant School	209	1,002,101	1,064,636	62,535	1,062,647	60,546	-1,989
Salterlee Primary School	101	501,353	531,762	30,409	531,168	29,815	-594
Savile Park Primary School	364	2,293,878	2,378,261	84,383	2,373,359	79,481	-4,902
Scout Road Academy	100	506,551	537,522	30,971	536,976	30,425	-546
Shade Primary School	178	854,222	906,184	51,962	904,660	50,438	-1,524
Shelf Junior and Infant School	257	1,148,583	1,214,985	66,402	1,214,985	66,402	0
Siddal Primary School	183	983,308	1,043,434	60,127	1,040,784	57,477	-2,650
St Andrew's Church of England (VA) Infant School	166	834,599	885,826	51,226	883,789	49,190	-2,037
St Andrew's CofE (VA) Junior School	208	1,019,293	1,081,388	62,096	1,078,841	59,548	-2,548
St Augustine's CofE School	146	888,742	940,173	51,432	937,154	48,412	-3,019
St John's (CofE) Primary Academy, Clifton	208	933,789	988,993	55,204	987,249	53,460	-1,744
St John's Primary School In Rishworth	144	664,402	704,050	39,648	703,010	38,608	-1,040
St Joseph's Catholic Primary Academy	164	808,368	856,462	48,094	855,030	46,662	-1,432
St Joseph's Catholic Primary Academy	195	920,900	976,061	55,161	974,178	53,278	-1,883
St Joseph's Roman Catholic Voluntary Academy	122	712,708	758,009	45,301	755,937	43,228	-2,073
St Malachy's Catholic Primary School, A Voluntary Academy	148	912,974	968,837	55,864	965,770	52,797	-3,067
St Mary's Catholic Primary Academy	303	1,533,310	1,630,196	96,887	1,618,386	85,077	-11,810

St Mary's CofE (VC) J and I School	98	507,834	531,712	23,878	538,543	30,709	6,831
St Michael and All Angels CofE Primary & Pre School	188	877,778	929,829	52,052	928,280	50,503	-1,549
St Patrick's Catholic Primary Academy	101	558,418	592,122	33,704	591,122	32,705	-999
Stubbings Infant School	33	256,313	264,960	8,646	264,653	8,340	-306
The Brooksbank School	1,419	8,744,925	9,289,371	544,447	9,271,413	526,488	-17,959
The Calder Learning Trust	1,370	8,218,402	8,732,439	514,037	8,716,660	498,258	-15,779
The Crossley Heath School	903	5,182,866	5,492,011	309,145	5,492,011	309,145	0
The Greetland Academy	410	1,837,619	1,996,748	159,129	1,996,748	159,129	0
The Halifax Academy	1,438	9,591,213	9,952,309	361,096	9,952,309	361,096	0
The North Halifax Grammar School	899	5,163,180	5,472,003	308,823	5,472,003	308,823	0
Todmorden CofE J, I & N School	204	1,021,993	1,083,338	61,345	1,080,813	58,820	-2,526
Todmorden High School	891	5,722,976	6,096,624	373,648	6,085,052	362,076	-11,572
Triangle CofE VC Primary School	191	908,445	963,509	55,064	961,608	53,163	-1,901
Trinity Academy Akroydon	289	1,469,323	1,556,972	87,649	1,552,631	83,309	-4,341
Trinity Academy Grammar	931	6,772,976	7,204,952	431,977	7,186,778	413,802	-18,174
Trinity Academy Halifax	1,605	10,648,015	11,305,646	657,631	11,281,082	633,067	-24,564
Trinity Academy St Chad's	151	698,072	740,784	42,712	739,881	41,808	-903
Trinity Academy St Peter's	106	637,129	676,323	39,194	674,456	37,326	-1,867
Tuel Lane Infant School	64	408,694	434,418	25,725	433,641	24,948	-777
Wainstalls School	203	899,201	949,574	50,373	948,485	49,283	-1,090
Walsden St Peter's CE (VC) Primary School	172	826,115	875,801	49,685	873,896	47,780	-1,905
Warley Road Primary Academy	451	2,316,835	2,451,044	134,209	2,443,556	126,721	-7,488
Warley Town School	140	687,641	728,825	41,184	727,468	39,826	-1,357
West Vale Academy	123	680,321	722,292	41,971	720,490	40,169	-1,802
Whitehill Community Academy	628	2,912,355	3,092,251	179,896	3,084,768	172,413	-7,483
Withinfields Primary School	313	1,470,506	1,561,659	91,152	1,558,326	87,820	-3,333

Woodhouse Primary School	418	1,875,177	1,984,124	108,947	1,984,124	108,947	0
Total		184,094,131	195,142,647	11,048,516	194,796,991	10,702,860	-345,656

Appendix 2

2023-24		
Greenwich	1,308,008.00	0.49%
Hackney	1,129,954.00	0.50%
Hammersmith and Fulham	1,154,400.00	1.00%
Kensington and Chelsea	409,503.00	0.50%
Lambeth	824,204.00	0.36%
Lewisham	726,342.00	0.31%
Southwark	1,200,000.00	0.43%
Bexley	1,080,446.00	0.50%
Brent	1,299,306.00	0.50%
Ealing	1,456,469.00	0.50%
Enfield	1,496,648.00	0.50%
Haringey	1,097,808.00	0.50%
Havering	1,108,989.00	0.50%
Hillingdon	1,337,029.00	0.50%
Kingston upon Thames	350,100.00	0.27%
Merton	1,248,541.00	0.83%
Newham	1,965,284.00	0.50%
Richmond upon Thames	537,135.00	0.38%
Waltham Forest	350,000.00	0.15%
Sefton	981,265.00	0.50%
Bury	521,069.00	0.35%
Rochdale	1,027,619.00	0.50%
Stockport	905,000.00	0.42%
Tameside	693,629.00	0.34%
Barnsley	1,876,807.00	0.98%
Doncaster	1,217,806.00	0.50%
Rotherham	3,459,251.00	1.50%
Sheffield	1,500,000.00	0.35%
Kirklees	2,100,000.00	0.60%
Leeds	3,338,612.00	0.50%
South Tyneside	578,198.00	0.50%
Sunderland	1,012,590.00	0.50%
Bath and North East Somerset	642,675.00	0.50%
Bristol	1,627,392.00	0.50%
North Somerset	1,545,484.00	1.00%
South Gloucestershire	2,200,034.00	1.11%

Redcar and Cleveland	535,000.00	0.50%
Stockton-on-Tees	794,840.00	0.50%
Kingston upon Hull	500,586.00	0.22%
East Riding of Yorkshire	1,147,248.00	0.50%
Central Bedfordshire	1,110,330.00	0.50%
Derby	55,000.00	0.02%
Bournemouth, Christchurch & Poole	183,793.00	0.07%
Darlington	169,324.00	0.21%
Rutland	151,467.00	0.50%
Stoke-on-Trent	997,000.00	0.47%
Wiltshire	1,716,505.00	0.50%
Reading	484,000.00	0.41%
Slough	713,787.00	0.44%
Cambridgeshire	4,528,200.00	1.00%
Halton	235,721.00	0.22%
Warrington	728,307.00	0.44%
Thurrock	742,472.00	0.47%
Herefordshire	616,000.00	0.50%
Kent	12,021,214.00	1.00%
Blackburn with Darwen	200,272.00	0.13%
Blackpool	527,983.00	0.50%
Cheshire West And Chester	1,267,455.00	0.50%
Cornwall	1,622,871.00	0.42%
Gloucestershire	56,200.00	0.01%
Hertfordshire	1,500,000.00	0.16%
Norfolk	9,015,497.00	1.50%
Northumberland	484,983.00	0.22%
Oxfordshire	2,383,308.00	0.50%
Somerset	1,500,000.00	0.40%
Surrey	7,928,660.00	1.00%
West Northamptonshire	1,663,776.00	0.50%

2022-23		
Greenwich	1,266,779.00	0.50%
Hackney	1,102,665.00	0.50%
Hammersmith and Fulham	555,536.00	0.50%
Kensington and Chelsea	385,630.00	0.49%
Lambeth	1,111,000.00	0.50%
Lewisham	704,742.00	0.32%

Southwark	1,200,000.00	0.44%
Tower Hamlets	1,445,000.00	0.50%
Westminster	617,691.00	0.50%
Bexley	1,024,685.00	0.50%
Brent	1,239,753.00	0.50%
Ealing	1,371,235.00	0.50%
Enfield	1,427,719.00	0.50%
Haringey	525,526.00	0.25%
Havering	1,028,678.00	0.50%
Hillingdon	1,259,485.00	0.50%
Kingston upon Thames	501,900.00	0.41%
Merton	1,198,000.00	0.86%
Newham	1,889,350.00	0.50%
Richmond upon Thames	300,400.00	0.22%
Bolton	1,005,928.00	0.39%
Bury	715,200.00	0.50%
Rochdale	967,786.00	0.50%
Stockport	217,783.00	0.11%
Tameside	953,713.00	0.50%
Trafford	64,485.00	0.03%
Wigan	250,000.00	0.11%
Barnsley	1,785,790.00	0.99%
Rotherham	3,275,417.00	1.50%
Sheffield	1,500,000.00	0.38%
Kirklees	1,600,000.00	0.48%
Leeds	3,127,403.00	0.50%
Wakefield	625,125.00	0.25%
South Tyneside	545,451.00	0.50%
Sunderland	950,582.00	0.50%
Bath and North East Somerset	614,665.00	0.50%
Bristol	1,530,959.00	0.50%
North Somerset	723,933.00	0.50%
South Gloucestershire	2,200,000.00	1.18%
Middlesbrough	607,960.00	0.50%
Stockton-on-Tees	751,827.00	0.50%
East Riding of Yorkshire	1,088,966.00	0.50%
Central Bedfordshire	1,035,554.00	0.50%
Derbyshire	2,627,277.00	0.50%
Derby	303,000.00	0.14%

Bournemouth, Christchurch & Poole	744,369.00	0.31%
Rutland	141,832.00	0.50%
Stoke-on-Trent	957,347.00	0.48%
Wiltshire	1,627,796.00	0.50%
West Berkshire	300,166.00	0.25%
Reading	484,000.00	0.45%
Slough	676,760.00	0.44%
Cambridgeshire	2,104,245.00	0.50%
Halton	1,013,903.00	0.99%
Warrington	417,886.00	0.27%
Thurrock	700,000.00	0.48%
Herefordshire	507,224.00	0.44%
Kent	10,000,000.00	0.89%
Medway	850,000.00	0.39%
Lancashire	1,680,135.00	0.19%
Blackpool	494,090.00	0.50%
Shropshire	949,076.00	0.50%
Cheshire West And Chester	1,194,623.00	0.50%
Cornwall	1,521,970.00	0.41%
Cumbria	1,066,740.00	0.32%
Gloucestershire	307,465.00	0.07%
Isle of Wight	210,555.00	0.26%
Norfolk	8,529,469.00	1.50%
Northumberland	515,696.00	0.25%
Oxfordshire	565,530.00	0.13%
Somerset	962,188.00	0.27%
Suffolk	2,382,144.00	0.49%
Warwickshire	1,908,055.00	0.48%
West Sussex	1,200,000.00	0.22%
North Northamptonshire	1,274,381.00	0.50%
West Northamptonshire	2,100,000.00	0.67%

Appendix 3

ID	Do you support a transfer of funding from the School Block to the High Needs Block for 2024-25?	Please let us know your reasons why and how you believe the increase in pressures on the HNB could be funded without this transfer?	Do you support the full transfer of 0.5% or £979k based upon indicative funding data?	Any additional comments to add?	If you do support the transfer, do you agree with funding the 0.5% firstly from any surplus funding after following NFF, secondly any surplus funding from Growth or Falling Rolls Fund and finally ...	Any additional comments to add?2
3	No	School already has a very tight budget and these constraints are already having an impact on the running of the school. Further money to be taken from the school's block would mean that school would be given even less funding.	No			
4	Yes		Yes		Yes	
5	No	School budgets cannot be squeezed anymore	No		No	
6	Yes		Yes		Don't know	I would need more budget information to look at taking money from individual budget share

7	Yes		Yes	Agree in principle with this transfer; however, if further funding information changes the positions outlined in appendix 1, then further consultation would be needed	Yes	not sure that there is another option if we want more funding in SEND
8	Yes		Yes		Yes	
9	No	<p>Comment</p> <ul style="list-style-type: none"> • High numbers of SEND in my school already • Not enough funding already for the needs we are dealing with – some children need 2:1 support and should be in a specialist provision • High numbers of EHCPs – 3% N/A • Will the funding be apportioned appropriately? • The need to continue with our SEMH unit, due to the high % of pupils with SEMH needs – already extra funding allocated to my school due to those with EHCs who need 2:1 support 	No	as above		

10	No	<ul style="list-style-type: none"> • Very high numbers of SEND at Lingbob and more emerging particularly in nursery. Funding already not sufficient • How will the funding be distributed? Will the process be fair? I am not convinced that it will be at present • How will this affect academies seeing as they have cut ties with the LA? • Finally (not wishing to be rude), it is not the job of heads to decide how the increase in pressures on the HNB is to be funded – we already have enough on 	No			
11	Yes		Yes			Agree in principle with this transfer; however, if further funding information changes the positions outlined in appendix 1, then further consultation would be needed.
12					Yes	Yes' (as not sure that there is another option if we want more funding in SEND!)

13	No	<p>We would welcome the development of appropriate alternative and specialist provision, supported by strong LA SEND and Inclusion teams, but are not yet currently confident in the quality of the current LA SEND offer and support, and regret the lack of appropriate specialist provision within the authority.</p> <p>We believe that there is not a sufficiently equitable approach within the authority to tackle the problem of permanent exclusions, whereby excluded students are sent to PRUs (often in different local authorities) rather than using the Fair Access protocols to enable them to transfer to another mainstream school; we believe that this lack of equity will impact particularly unfavourably on Lightcliffe Academy (which tries very hard to avoid permanent exclusions) if this funding change goes through.</p>	No	Neither		NA
14	Yes		Yes		Yes	
15	No	<p>The impact on our school budget would be too detrimental to teaching and learning. Even with some additional support for high needs pupils, I am still funding staff to support children in school.</p>	Don't know			

16	No	Schools funding in real terms has reduced year on year in comparison to other costs of running a school. Salary costs and energy cost are two examples where cost increases have overtaken the additional funding. HNB funding deficits needs to be found from efficiencies elsewhere within the LA, full details of which we are not party to.	No		No	
17	No	<p>Last academic year, I had to restructure my staffing and make a number of redundancies along with not replacing staff members when they leave in some roles. There are also falling roles within my area which in turn means falling budget.</p> <p>My staffing structure is very skeletal at present. As a school that doesn't not attract much additional funding e.g pupil premium, I simply do not have the budget to support this. With a support staff pay increase looming and the teacher pay increase (which is not funded as expected) this will create even further pressures on the budget.</p>	No			

18	Yes		Yes		Yes	<p>However, as a teacher myself I think it's also worth commenting on the statement that there has been a "marked increase" in permanent exclusions. I believe it is vital that the LA must take steps to work with all schools to examine the reasons for this and seek to reverse that trend, not just cater for it by expanding alternative provision which is already in too short supply. Schools cannot and should not be expected to sacrifice their decreasing budgets to help others when they're in need desperate need already.</p>
----	-----	--	-----	--	-----	--

19						<p>The LA have a higher percentage of EHCps in mainstream compared to other LA and NA.</p> <p>This I wouldn't say is a positive, more evidence of unmet needs and unsuitable provision caused by a lack of LA provision.</p> <p>Will there be support for schools like PLA, where we have 3x the Calderdale average EHCps, and have the group acknowledged those schools that have a large number of students with EHCps in comparison to others, and what support will they receive from thje SEND LA team?</p> <p>I'm accepting of the need to fund the deficit but it must</p>
----	--	--	--	--	--	---

						result in better provision for students, not wasted on independent and out of LA places that are not cost effective, or reasonable for families and young children to attend consistently .
--	--	--	--	--	--	---

20	No	I don't know. All I know is my budget is at breaking point. I have had to make staff redundant and we are struggling to meet the children's needs as it is. The notion to take even more of my budget is ludicrous - all this would mean is that more children's needs would go unmet and therefore we would have to refer more to outside agencies, where we perhaps could have coped previously.	No	See my previous comment!	No	School budgets are so tight and it is unacceptable to strip any more.
----	----	--	----	--------------------------	----	---

21	Yes		Yes		Yes	
22	No	<p>This feels like a sticking plaster to fix an amputation, a further c.£5m being required in 2023/24 alone to balance the HNB.</p> <p>Whilst I fully appreciate the mounting pressures on the HNB and the difficult challenges the LA is grappling with, I cannot support the transfer of funding from the School's Block to the HNB.</p> <p>Most schools are seriously struggling financially (in the NGA's recent annual governance survey less than 2/10 boards said they were financially sustainable in the medium to long term). The reasons and impact are well known to all so require no explanation in this response.</p> <p>I govern at two schools in Calderdale. Both are in a stronger financial position than many, but have in year deficits to address and difficult choices to make. A cut of 0.5% to GAG/DSG will only exacerbate each school's financial difficulties.</p> <p>The report is misleading (although I appreciate it must have been very difficult to write), in that the £ impact to schools noted in appendix 1 is much less</p>	No	Response is from the Chair of Governors and Headteacher.		

		<p>than schools will actually face in reality. The surplus of £633k, whilst I understand is more than the required NFF allocation, has already been included in school's 3 - year budgets. The real impact to schools of the whole £979k being removed is therefore significantly higher than tabled. Hasn't quality of education been impacted enough in recent years, especially following the pandemic?</p> <p>The LA's proposal to fund the transfer of £346k from the School's Block using the factors used in the calculation of the notional SEND budget disproportionately affects those schools in disadvantaged areas facing some of the greatest challenges. This is because the four listed factors and disadvantage are inextricably linked. It is therefore unfair. The report doesn't specify how the £633k would be split but if the same method is used, schools with high levels of disadvantage would be further penalized e.g. in one of my schools the real impact would be closer to £9k, not £3k. This could be the difference between a class having a TA and not.</p> <p>Growing SEND numbers and needs mean</p>				
--	--	---	--	--	--	--

		<p>that SEND notional budgets, despite in Calderdale being 2.2% above n/a, are already 'notionally overspent' in many schools. The notional SEND budget is not additional funding, but an historically inflated figure which has not been uplifted in line with increased SEND requirements in schools. The report notes a higher % of children with EHCP's in Calderdale mainstream schools' than nationally, therefore putting greater pressure on Calderdale school's SEND notional budgets to fund 1:1 needs in particular. Schools need more direct funding to meet the needs of both children with EHCP's and IEPs, not less. This is against a background of falling pupil numbers and therefore funding (e.g. up to 50% surplus reception capacity in Hebden Bridge area by 25/26 as per Planning of School Places 2022).</p> <p>The report notes the number of special school places in Calderdale has increased in the past 5 years and will continue to increase along with SEND Hub places etc. However, the report lacks detail, and this would be appreciated. It is difficult to fully answer question 2 without this</p>				
--	--	--	--	--	--	--

		<p>information.</p> <p>Are SEND/exclusion costs exacerbated by out of borough placements due to lack of capacity in Calderdale? It's not clear from the report. If so, further upfront investment in additional places/facilities to reap longer term cost efficiencies must be a consideration.</p> <p>If my calculations are right almost 80% of LAs in 2023/24 are not transferring funding from the School's Block to the HNB. Whilst I appreciate SEND pressures are a national issue, is there anything Calderdale can learn from these LAs?</p> <p>Does Calderdale have a Strategic Plan that significantly challenges current thinking including process, infrastructure, prevent v cure etc, bottom up, and realigns SEND needs with funding?</p> <p>Schools need to see this if so, if not, this must be the LA's focus and priority.</p>				
--	--	---	--	--	--	--

23	No	<p>An analysis and reporting of why it is so overspent and returning to council for funding. Taking funding from schools block for high needs block goes against CAFA regulation 42 as it is the LA responsibility to fund EHCPs not schools responsibility.</p> <p>The schools funding operational guidance is exactly that, guidance. Law supersedes guidance. We cannot vote to support something which is effectively breaking the law.</p>	No		No	
24	No	Based on the factors used to reduce the schools block, the most vulnerable pupils in Calderdale will be affected. Many of these LPA and FSM pupils will also have SEND but no EHCP, so would not benefit	No		No	

		from the increase to the high needs block.				
25	Yes		Yes		Yes	<p>As a Governing Body we feel passionate that we must ensure the High Needs Block is adequately funded and morally obliged to answer Yes. However, we also feel very worried about the effect on the School Block and wish there was a way that the H.N.B could be funded from elsewhere.</p> <p>We are very grateful for the support our school is able to access for EHCP funding as a result of H.N.B</p> <p>However, we are very concerned that the current infrastructure around exclusions and Alternative</p>

						<p>Provision and Independent Special Schools will mean that 'the bill' will continue to grow over the next few years and would urge that thought and work goes into the provision available. Here at Ash Green we would like nothing more than to offer our Lower Site building as a base for Calderdale to run its own provision in a manner that would give massively increased capacity and save innumerable amounts in the long run. This is something we have previously discussed in conjunction with our bid to extend our</p>
--	--	--	--	--	--	---

						<p>Upper Site.</p> <p>The governors also expressed concern at the huge rise in exclusions and wondered about the parity across schools in preventing exclusions. At Ash Green we have the highest number of EHCP, CP plans and CLA and do NOT exclude pupils. We hope that there is some scrutiny/quality assurance of the exclusions in our LA which are clearly costing a huge amount of money thus meaning the HNB is needing this level of investment.</p>
26	Yes		Yes		Yes	

27	No	<p>Following the presentation made at CASH by Paul Tinsley I am in objection to this proposal. Removing this funding from schools with the highest need, whilst others feel no impact serves only to put further demands on the most vulnerable students on the 'frontline'. The funding that Trinity Academy Grammar would have removed is roughly the equivalent of one teaching assistant. Given that we have already reduced the team to the absolute bare minimum I do not know how we would find this saving.</p> <p>Further to the direct impact this suggestion has on schools, I cannot understand why the local authority has not undertaken a strategic review of other areas of SEND related staffing within the council itself. It is my view, and I believe it is shared by other head teachers across the borough, that elements of the service are not running efficiently. The approach of looking to remove this money from schools first will further exasperate issues we are already experiencing. Schools will be stretched further still but with still no improvement in the LA's central service. I believe if</p>	No		No	
----	----	---	----	--	----	--

		would have been far better (although maybe less palatable) for the LA to have looked to realise efficiency within its own staffing before looking to remove provision directly from the most vulnerable students we provide for.				
28	No	We have no evidence to convince us that our contribution would or could be used effectively, to benefit our children through this transfer of funding. Effectively, it just cuts our budget once more.	No			

29	No	<p>This recommendation is not addressing the bigger picture of bringing high needs spending in line with funding.</p> <p>Whilst I fully appreciate the mounting pressures on the HNB and the difficult challenges the LA is having to grapple with I cannot support the transfer of funding from the School's Block to the HNB. As many schools are seriously struggling financially the impact of this reduction will further impact schools' financial viability. Schools are already finding it difficult to deal with the increase in SEN children within their schools and providing them with the support that they deserve. From information that I am privy to as a trustee and governor schools appear to be in constant negotiations with the LA for ECHP approval (and in many cases not able to understand the logic of one child being eligible whilst another is not). The schools that I govern are seriously under financed with regards to the expenditure that they are incurring in supporting these children. I govern at two schools and a MAT in Calderdale. Both schools have in year deficits to address one of</p>	No		No	<p>Looking at the bigger picture the whole HNB and the amounts that mainstream schools receive for SEND needs a complete review by LA /Schools and Governors</p>
----	----	---	----	--	----	--

		<p>which has extreme numbers of SEN/ECHP's with little recognition or funding from the LA, what funding is provided is on a one year basis – and no school can plan a three year budget on that basis! Within the MAT our recent understanding is that any additional funding is not available if there is funding within other schools in the MAT. Who makes these decisions/rules and is this policy transparent?. A cut of 0.5% to GAG/DSG will only exacerbate each school's financial difficulties.</p> <p>If I've understood the report correctly, the £ impact to schools noted in appendix 1 is much less than schools will actually face from the funding they would have got if there was no movement to the HNB. The surplus of £633k, whilst I understand is more than the required NFF allocation would have been included in the schools budget . The real impact to schools of the whole £979k being removed is therefore significantly higher than tabled.</p> <p>The LA's proposal to fund the transfer</p>				
--	--	--	--	--	--	--

		<p>from the School's Block using the factors used in the calculation of the notional SEND budget disproportionately affects those schools in disadvantaged areas that are facing some of the greatest challenges. This is because the four listed factors and disadvantage are inextricably linked. It is therefore unfair. Must the 0.5% come from these factors ?.</p> <p>Growing SEND numbers and needs mean that SEND notional budgets, despite in Calderdale being 2.2% above n/a, are already 'notionally overspent' in many schools. The notional SEND budget is not additional funding, but an historically inflated figure which has not been uplifted in line with increased SEND requirements in schools. The report notes a higher % of children with EHCP's in Calderdale mainstream schools' than nationally, therefore putting greater pressure on Calderdale school's SEND notional budgets to fund 1:1 needs in particular. Schools need more direct funding to meet the needs of both children with EHCP's and IEPs, not less. Evidence from the schools that I govern show that the £6K notional SEND and the</p>				
--	--	--	--	--	--	--

		<p>top up for a ECHP is in adequate compared to the funds that a school commits to these children, at the expense of other children and their needs. The report notes the number of special school places has increased in Calderdale in the past 5 years and that these will continue to increase along with SEND Hub places etc. however, there is no detail in the report, and this would be appreciated. It is difficult to fully answer question 2 without this information.</p> <p>Are SEND and exclusion costs being exacerbated by out of borough placements due to lack of capacity in Calderdale? It's not clear from the report. If so, further upfront investment in additional places/facilities to reap longer term cost efficiencies must be a consideration. I am concerned that the special provision does not met the needs of SEN children, for example children with social and em</p>				
--	--	--	--	--	--	--

30	No	Reconsidering your staffing model as a whole, schools will have to make cuts without this funding- esp in the number of teaching assistants employed.	No	<p>If you reduce school funding you will reduce the quality of the provision schools provide and thus increase exclusions.</p> <p>As a school we strongly do not support this. While we appreciate your budgets are tight, our budgets are also increasingly tight.</p>		
----	----	---	----	---	--	--

31	No	<p>It is noted that the full-year effect on Shade School is (£1,524), 1.68% of its budget. Please note that Shade already has a forecast current-year deficit of (£915), which includes an existing EHCP shortfall of (£7523), which is 8.3% of its budget. In this financial situation, there is no way in which the Board of Governors can support a further reduction in funding for the school.</p> <p>Notwithstanding the economic realities within which Shade operates (50% increases in energy bills which have been met by reduced staff numbers), following a review of the analysis in the consultation, there appears to be an assumption of a cost of c£1550 per plan issued (based upon mean av. of cost from 2021-2023). This suggests that a 157% increase to 645 plans being issued, and there is no justification provided to underpin this assumption especially as the mean average increase in plans in the data provided is 26%. Mathematically, the changes proposed do not seem to make sense and there is no justification for where the figure of £1m comes from. It is clear that, while the consultation</p>	No	see above	No	not supported
----	----	--	----	-----------	----	---------------

		<p>document has assessed the sums to be reallocated, there is no assessment of that concomitant loss on the affected schools, nor the aggregate effect on the schools' economy as a whole, nor even gives a methodology to do so. Indeed, the consultation fails to ask at all what the effect on schools will be as this reduction in funding has to be bridged from some other form of provision. We strongly feel this oversight in the consultation is negligent.</p> <p>The proposed transfer is also a hand-brake turn on the well-established policy referred to in the increase in early years inclusion funding from High Needs Block funding over the last five years. There is no assessment of the likely effects of such a U-turn on early years inclusion funding. The statement in the document refers to "continued increasing demand for support" without any assessment of whether that increase is justified or not the result of major changes in service provision over the period, such as the pandemic. "Demand" does not equal a need to supply, especially in complex economies such as the education sector.</p>				
--	--	--	--	--	--	--

		<p>There is no analysis of the reasons for increased exclusions in the document and no account of what sectors are the major origins of that increase and the effect of the originating sectors' educational practices on that increase, or the costs being met by maintained schools to meet these demands.</p> <p>Given the above omissions, there is no evidence that</p> <ul style="list-style-type: none"> • the demand for additional funding for the High Needs Block is a legitimate need; • the reallocations meet the principles overall and the duty of the Local Authority to provide the best value for all parts of the education economy in Calderdale; or • the increase seen in referrals over the period 21/22 to date is likely to continue or not <p>The case for the change is therefore unproven. Furthermore, we assume that any surplus funding not allocated would not be reallocated to schools should the demand not be met, which is clearly an unsatisfactory state of affairs.</p> <p>Instead, the points raised above on demand and supply should be subject to</p>				
--	--	---	--	--	--	--

		more detailed and balanced scrutiny to arrive at the correct decision, with current practice given a fair weighting. Until then, the status quo should be maintained and schools' allocations protected.				
32	No	Comment The impact on our budget (Both Sacred Heart & St. Joseph's Halifax) would be detrimental to our day to day running. I do not feel it is within my JD to advise the LA on where to find the funds needed.	No		No	
33	Yes		Yes		Yes	

34	No	<p>Whilst we understand the mounting pressure on the High Needs Budget to support the increasing number of children who have EHCP's or require extra funding we cannot support the transfer of funding from the Schools Block to the High Needs Block.</p> <p>Schools already have major funding pressures in relation to the funding of SEND and EHCP's. All of our schools are finding it difficult to provide the required support to meet the needs of children with additional needs, many of these do not have an EHCP plan or if they do the amount received does not cover the support required.</p> <p>We feel that EHCP's are underfunded and have been for a long time. Historically the EHCP or Statement covered someone on NJC2 with 8% oncosts. In this climate our schools are having to pay a minimum of NJC6 (with some having to pay higher than this to appoint staff). The oncost is around 25%. Over the years the EHCP budget has only increased slightly and usually below the rate of cost of living increases.</p> <p>The movement of £6000 into the schools</p>	No			
----	----	--	----	--	--	--

		<p>block was a government requirement around 10 years ago. This requirement meant that the value in the High Needs Block, which amounted to the first £6000 of all statements at that time, moved via a lump sum into the schools block. This transferred amount added to the baseline in the schools block in the areas of AWPU (1/3rd) prior attainment (1/3rd) and deprivation (1/3rd), this increase in the baseline figure has remained at the same value for all these years and has only increased by any increases the DFE gives to the Schools block, usually as a result of pay awards. As can be seen in the consultation, the numbers of awarded EHCP's since 2017 of 135 has increased threefold to the current number of plans awarded to 410. Therefore the amount of money in the schools block which should pay for the first £6000 in reality only has the value to pay for just over £2000 for each EHCP's. A massive amount of underfunding.</p> <p>Two of the Calderdale schools in our trust have over the average of EHCP's in 2023-24. One of our Secondary schools has historically always had over the average</p>				
--	--	--	--	--	--	--

		<p>numbers of EHCP's. Schools with over average EHCP's have even more pressure on their schools budget. Is there going to be extra funding for the schools taking over average EHCP's?</p> <p>The impact to schools is even more than that listed in appendix 1 which shows the estimated impact to the individual schools budgets amounting to £345K. There was a surplus of £633K after allocating NFF, which would usually have been allocated back to the schools individual budgets. This therefore means the impact to schools budget is 3 times the amount shown in appendix 1.</p> <p>While we appreciate that there is a national underfunding issue relating to High Needs, we do not feel that this should be topped up from the schools block. We appreciate that there are some LA's who do transfer up to 0.5% from the schools block, however, there are others who do not. Would it be an idea to speak to these authorities to see how they manage their High Needs funding without having to take from the schools block.</p> <p>It may be beneficial for a working group to be formed, made up of representatives</p>				
--	--	--	--	--	--	--

		from schools as well as LA officers, to look deeper into the issues around High Needs funding.				
--	--	--	--	--	--	--

35	No	<p>Whilst we understand the mounting pressure on the High Needs Budget to support the increasing number of children who have EHCP's or require extra funding we cannot support the transfer of funding from the Schools Block to the High Needs Block.</p> <p>Schools already have major funding pressures in relation to the funding of SEND and EHCP's. All of our schools are finding it difficult to provide the required support to meet the needs of children with additional needs, many of these do not have an EHCP plan or if they do the amount received does not cover the support required.</p> <p>We feel that EHCP's are underfunded and have been for a long time. Historically the EHCP or Statement covered someone on NJC2 with 8% oncosts. In this climate our schools are having to pay a minimum of NJC6 (with some having to pay higher than this to appoint staff). The oncost is around 25%. Over the years the EHCP budget has only increased slightly and usually below the rate of cost of living increases.</p> <p>The movement of £6000 into the schools</p>				
----	----	--	--	--	--	--

		<p>block was a government requirement around 10 years ago. This requirement meant that the value in the High Needs Block, which amounted to the first £6000 of all statements at that time, moved via a lump sum into the schools block. This transferred amount added to the baseline in the schools block in the areas of AWPU (1/3rd) prior attainment (1/3rd) and deprivation (1/3rd), this increase in the baseline figure has remained at the same value for all these years and has only increased by any increases the DFE gives to the Schools block, usually as a result of pay awards. As can be seen in the consultation, the numbers of awarded EHCP's since 2017 of 135 has increased threefold to the current number of plans awarded to 410. Therefore the amount of money in the schools block which should pay for the first £6000 in reality only has the value to pay for just over £2000 for each EHCP's. A massive amount of underfunding.</p> <p>Two of the Calderdale schools in our trust have over the average of EHCP's in 2023-24. One of our Secondary schools has historically always had over the average</p>				
--	--	--	--	--	--	--

		<p>numbers of EHCP's. Schools with over average EHCP's have even more pressure on their schools budget. Is there going to be extra funding for the schools taking over average EHCP's?</p> <p>The impact to schools is even more than that listed in appendix 1 which shows the estimated impact to the individual schools budgets amounting to £345K. There was a surplus of £633K after allocating NFF, which would usually have been allocated back to the schools individual budgets. This therefore means the impact to schools budget is 3 times the amount shown in appendix 1.</p> <p>While we appreciate that there is a national underfunding issue relating to High Needs, we do not feel that this should be topped up from the schools block. We appreciate that there are some LA's who do transfer up to 0.5% from the schools block, however, there are others who do not. Would it be an idea to speak to these authorities to see how they manage their High Needs funding without having to take from the schools block.</p> <p>It may be beneficial for a working group to be formed, made up of representatives</p>				
--	--	--	--	--	--	--

		from schools as well as LA officers, to look deeper into the issues around High Needs funding.				
--	--	--	--	--	--	--

Report to Schools Forum

Meeting Date	19 th October 2023
Subject	School Funding 2024/25
Report Author	Jane Davy

Report purpose

To consult members of Schools Forum with the latest proposals for school funding for 2024/25 based on the DfE 2024-25 Operational Guidance and the indicative funding notified to the LA.

Background Information

In July 2023 the DfE released the indicative funding for LA's based on Oct 2022 data. The LA will still calculate local formulae for 24/25 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 23/24 schools mainstream schools additional 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) 2.4% to the basic entitlement, low prior attainment (LPA), FSM6, income deprivation affecting children index (IDACI), English as an additional language (EAL), mobility, and sparsity factors, the lump sum and minimum per pupil levels (MPPL)
 - ii) 0.5% to the funding floor
 - iii) 1.6% to the free school meals (FSM) factor value
 - 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 10.4.2 % for the year April 2023 and split sites which has been formularised.
 - v) Introducing, for the first time, a methodology for calculating and allocating funding for falling rolls.

- vi) Local authorities have the freedom to set the MFG in their local formulae between +0.0 and +0.05% per pupil.
- Transition requirements to bring local formulae closer to the NFF. Local authorities were required to bring their own formulae closer to the schools NFF from 2023/24. This transition will continue in 2024 to 2025. In particular:
 - i) Local authorities must move their local formula factor values at least a further 10% closer to the NFF, except where local formulae are already mirroring the NFF. These criteria do not apply to optional, locally determined factors.
 - ii) Local authorities must use the new national formulaic approach to split sites.
 - iii) Local authorities must follow the new local formula requirements for growth funding, whereby additional classes (driven by basic need) must be funded by at least the minimum funding level set out in the funding calculation.
 - 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.
 - v) Local Authorities with a falling rolls fund must also follow the new requirements for falling rolls funding, whereby local authorities can only provide falling rolls funding to schools where school capacity survey (SCAP) 2022 data shows that school places will be required in the subsequent 3 to 5 years. The restriction, that schools were previously only eligible for falling rolls funding if they were judged “good” or “outstanding” by Ofsted, is also being removed from 24/25.
 - vi) Local Authorities continue to be able to transfer up to 0.5% of their schools block to other blocks of the DSG, with schools forum approval.
- Notional SEN budgets

Local Authorities are required to identify a notional budget for their mainstream schools which help them comply with their duty to use their “best endeavours” to meet the special educational needs of their pupils. The notional SEN budget is not a separate budget but is identified within a maintained school’s delegated budget share, or an academy’s general annual grant and is calculated by local authorities using their local mainstream schools funding formula factors.

Need for consideration

Calderdale has received indicative schools block funding, based on October 22 data, of £195.77m (excluding growth fund and falling rolls fund but including mainstream schools additional grant), plus indicative teachers pay grant funding of £3.2m this is an increase of £8.84m on 2023/24 funding

LA officers are proposing that Calderdale adopt the formula factors used in the NFF, the values used to calculate the school block allocation will depend upon the School Forum Members decision on the transfer of 0.5% Schools Block to High Needs Block. However, regardless of the decision the LA is not allowed to go below or above certain values. The table below shows the NFF allocations and the Min/Max values the LA can use, 2023/24 values are included for comparison.

Factor	2023 to 2024 LA adopted funding formula values	2024 to 2025 national funding formula (NFF) values	2024 to 2025 NFF minimum value	2024 to 2025 NFF maximum value
Primary basic entitlement	£3,394.54	£3,597.61	£3,507.67	£3,687.55
KS3 basic entitlement	£4,785.77	£5,072.86	£4,946.04	£5,199.68
KS4 basic entitlement	£5,393.86	£5,717.97	£5,575.02	£5,860.92
Primary FSM	£480.08	£490.08	£477.83	£502.34
Secondary FSM	£480.08	£490.08	£477.83	£502.34
Primary FSM6	£705.11	£830.14	£809.39	£850.89
Secondary FSM6	£1,030.16	£1,210.21	£1,179.95	£1,240.46
Primary IDACI F	£230.04	£235.04	£229.16	£240.92
Primary IDACI E	£280.04	£285.05	£277.92	£292.17
Primary IDACI D	£440.07	£450.08	£438.82	£461.33
Primary IDACI C	£480.07	£490.08	£477.83	£502.34
Primary IDACI B	£510.08	£520.09	£507.09	£533.09
Primary IDACI A	£670.11	£685.12	£667.99	£702.24
Secondary IDACI F	£335.04	£345.06	£336.43	£353.69
Secondary IDACI E	£445.07	£455.08	£443.70	£466.45
Secondary IDACI D	£620.10	£635.11	£619.23	£650.99
Secondary IDACI C	£680.11	£695.12	£677.74	£712.50
Secondary IDACI B	£730.12	£750.13	£731.37	£768.88
Secondary IDACI A	£930.15	£950.16	£926.41	£973.92
Primary EAL3	£580.09	£595.10	£580.22	£609.98
Secondary EAL3	£1,565.25	£1,605.27	£1,565.14	£1,645.40
Primary LPA	£1,155.18	£1,185.20	£1,155.57	£1,214.83
Secondary LPA	£1,750.28	£1,790.30	£1,745.55	£1,835.06
Primary mobility	£945.15	£970.16	£945.91	£994.42
Secondary mobility	£1,360.22	£1,395.24	£1,360.36	£1,430.12
			£132,329.9	£139,116.1
Primary lump sum	£128,020.48	£135,723.07	9	5
			£132,329.9	£139,116.1
Secondary lump sum	£128,020.48	£135,723.07	9	5
Primary sparsity	£56,309.01	£57,709.81	£56,267.06	£59,152.55
Secondary sparsity	£81,913.10	£83,914.26	£81,816.41	£86,012.12
All-through sparsity	£81,913.10	£83,914.26	£81,816.41	£86,012.12
Split sites basic eligibility	£25,604.10	£54,309.23	£52,951.50	£55,666.96
Split sites distance	£0.00	£27,104.61	£26,426.99	£27,782.22

Split Site

This will now follow the NFF values which are £54,309.20 for basic eligibility funding, 4 schools qualify and £27,104.61 distance funding rate, 3 schools qualify for the full amount, 1 school qualifies for a tapered amount.

Capping

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

MFG

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 2022 data and expected Sept 23 pupil numbers indicates Halifax Academy would qualify for MFG and would be over protected by £27.58 per pupil and Calder High would not qualify for MFG. However, calculations show that Calder High would be under protected by £8.54 per pupil if MFG has to be applied once the Oct 2023 data is applied.

Modelling on 2022 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 September 2023. Halifax Academy have written giving approval of the disapplication request and no objections were received. The LA have therefore applied for the disapplication in time to meet the ESFA deadline of the 10th October 2023, Forum Members will be updated on the result of the request at the January 2024 meeting

Modelling

The funding formula has been modelled on October 22 data, Option 1 is the impact of moving 0.5% to the high needs block and Option 2 is the impact of following the NFF values

In summary modelling shows;

Option 1

2 schools would remain on MFG and as a minimum receive 0.5% 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.

Option 2

2 schools would remain on MFG and as a minimum receive 0.5% increase per pupil. MFG disapplication (if approved) would be applied to one through school.

10 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, although Option 2 currently leaves £633k additional funding to be allocated, if when running the actual October 2023 data

in the formula this is still the case the excess funding will be allocated to the basic entitlement factor for both sectors up to the allowable maximum value, followed by FSM ever 6 and the lump sum. However, if it found there is a shortfall of funding the formula will be adjusted, in the following order;

- 1) Basic Entitlement to the minimum value allowed
- 2) Reduce MFG (but no lower than +0%)
- 3) Introduce capping for gaining schools (except those schools who would gain through receiving MFFL funding).

Consultation with schools

The Local Authority has a requirement to consult with both maintained schools and academies on the changes to the funding formula. The LA has consulted with schools on the proposal to move 0.5% from the Schools Block to the High Needs Block, the results of the consultation are included in Item 10 on the agenda.

Need for decision

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.

Contact Officers

Jane Davy
Acting Team Leader LMS Team
Jane.davy@calderdale.gov.uk
01422 393543

Appendix A

School Name	Pupil Number s	2023/24 Actual	Option 1 (trf 0.5% to HN)	Diff between 23/24 and Option 1	Option 2 (NFF values)	Diff between 23/24 and Option 2
Abbey Park Academy	197	1,059,864	1,121,603	61,738	1,124,386	64,522
All Saints' CofE Primary School	212	937,253	990,701	53,449	990,701	53,449
Ash Green Community Primary School	404	2,290,166	2,478,486	188,319	2,486,342	196,176
Bailiffe Bridge Junior and Infant School	198	916,013	969,944	53,932	971,643	55,630
Barkisland CofE VA Primary School	194	857,782	906,703	48,921	906,703	48,921
Beech Hill School	461	2,519,039	2,608,506	89,467	2,608,506	89,467
Bolton Brow Primary Academy	210	964,673	1,021,562	56,889	1,023,328	58,654
Bowling Green Academy	145	708,894	750,950	42,056	752,352	43,458
Bradshaw Primary School	331	1,463,363	1,546,141	82,779	1,547,147	83,784
Brighthouse High School	1,032	6,288,431	6,666,119	377,689	6,678,680	390,249
Burnley Road Academy	180	880,550	932,039	51,489	933,965	53,415
Carr Green Primary School	312	1,446,744	1,524,794	78,050	1,528,213	81,470
Castle Hill Primary School	182	882,777	935,595	52,818	937,352	54,575
Central Street Infant and Nursery School	59	377,598	395,172	17,574	395,966	18,368
Christ Church CofE VA Junior School, Sowerby Bridge	110	618,570	655,065	36,496	656,608	38,038
Christ Church Pellon CofE VC Primary School	168	978,173	1,032,851	54,679	1,035,818	57,645
Cliffe Hill Community Primary School	169	953,540	1,005,693	52,153	1,008,304	54,764
Colden Junior and Infant School	77	477,747	507,630	29,883	508,117	30,370
Copley Primary School	289	1,310,211	1,387,627	77,416	1,387,627	77,416
Cornholme Junior, Infant and Nursery School	148	832,175	881,182	49,008	883,726	51,551
Cross Lane Primary and Nursery School	305	1,546,479	1,637,714	91,236	1,642,275	95,796
Dean Field Community Primary School	199	1,116,123	1,181,878	65,755	1,185,009	68,886

Elland Church of England (Voluntary Aided) J, I and N School	160	974,185	1,030,765	56,580	1,034,095	59,910
Ferney Lee Primary School	181	1,021,429	1,081,854	60,426	1,085,066	63,638
Field Lane Primary School	99	631,298	668,646	37,348	670,825	39,526
Hebden Royd CofE VA Primary School	92	479,434	507,920	28,485	508,593	29,159
Heptonstall Junior Infant and Nursery School	67	396,781	409,378	12,597	409,744	12,963
Holy Trinity Primary School, A Church of England Academy	351	1,710,417	1,807,704	97,286	1,811,982	101,565
Holywell Green Primary School	166	835,877	886,602	50,724	888,366	52,488
Lee Mount Primary School	307	1,661,046	1,735,890	74,843	1,741,434	80,387
Lightcliffe Academy	977	6,245,499	6,613,085	367,586	6,627,501	382,002
Lightcliffe C of E Primary School	414	1,829,097	1,933,621	104,524	1,933,621	104,524
Ling Bob Junior, Infant and Nursery School	306	1,695,584	1,794,447	98,863	1,800,688	105,104
Longroyde Primary School	374	1,707,755	1,881,125	173,370	1,884,676	176,920
Luddenden CofE School	100	594,010	631,140	37,130	632,680	38,670
Luddendenfoot Academy	191	850,535	901,537	51,003	902,594	52,060
Midgley School	95	509,297	539,422	30,125	540,352	31,056
Moorside Community Primary School	207	1,207,198	1,287,021	79,823	1,290,569	83,370
Mount Pellon Primary Academy	294	1,599,347	1,663,255	63,908	1,667,458	68,111
New Road Primary School	162	860,271	910,547	50,277	912,807	52,536
Norland CE School	76	432,050	457,570	25,520	458,113	26,063
Northowram Primary School	405	1,821,401	1,924,955	103,554	1,924,955	103,554
Old Earth Primary School	412	1,840,501	1,944,712	104,211	1,948,925	108,424
Old Town Primary School	71	403,702	428,674	24,972	429,124	25,421
Park Lane Academy	449	3,499,573	3,716,891	217,317	3,727,117	227,544
Parkinson Lane Community Primary School	524	2,793,036	2,941,383	148,347	2,952,495	159,459
Rastrick High School	1,743	10,437,870	11,067,356	629,486	11,086,369	648,499
Ripponden Junior and Infant School	195	922,628	974,247	51,619	976,456	53,828
Riverside Junior School	143	700,592	743,980	43,388	745,172	44,580

Ryburn Valley High School	1,383	8,608,235	9,145,587	537,351	9,162,023	553,788
Sacred Heart Catholic Voluntary Academy	192	985,916	1,045,001	59,085	1,047,658	61,742
Salterhebble Junior and Infant School	209	1,002,101	1,062,647	60,546	1,064,636	62,535
Salterlee Primary School	101	501,353	531,168	29,815	531,762	30,409
Savile Park Primary School	364	2,293,878	2,373,359	79,481	2,378,261	84,383
Scout Road Academy	100	506,551	536,976	30,425	537,522	30,971
Shade Primary School	178	854,222	904,660	50,438	906,184	51,962
Shelf Junior and Infant School	257	1,148,583	1,214,985	66,402	1,214,985	66,402
Siddal Primary School	183	983,308	1,040,784	57,477	1,043,434	60,127
St Andrew's Church of England (VA) Infant School	166	834,599	883,789	49,190	885,826	51,226
St Andrew's CofE (VA) Junior School	208	1,019,293	1,078,841	59,548	1,081,388	62,096
St Augustine's CofE School	146	888,742	937,154	48,412	940,173	51,432
St John's (CofE) Primary Academy, Clifton	208	933,789	987,249	53,460	988,993	55,204
St John's Primary School In Rishworth	144	664,402	703,010	38,608	704,050	39,648
St Joseph's Catholic Primary Academy	164	808,368	855,030	46,662	856,462	48,094
St Joseph's Catholic Primary Academy	195	920,900	974,178	53,278	976,061	55,161
St Joseph's Roman Catholic Voluntary Academy	122	712,708	755,937	43,228	758,009	45,301
St Malachy's Catholic Primary School, A Voluntary Academy	148	912,974	965,770	52,797	968,837	55,864
St Mary's Catholic Primary Academy	303	1,533,310	1,618,386	85,077	1,630,196	96,887
St Mary's CofE (VC) J and I School	98	507,834	538,543	30,709	531,712	23,878
St Michael and All Angels CofE Primary & Pre School	188	877,778	928,280	50,503	929,829	52,052
St Patrick's Catholic Primary Academy	101	558,418	591,122	32,705	592,122	33,704
Stubbings Infant School	33	256,313	264,653	8,340	264,960	8,646
The Brooksbank School	1,419	8,744,925	9,271,413	526,488	9,289,371	544,447
The Calder Learning Trust	1,370	8,218,402	8,716,660	498,258	8,732,439	514,037
The Crossley Heath School	903	5,182,866	5,492,011	309,145	5,492,011	309,145
The Greetland Academy	410	1,837,619	1,996,748	159,129	1,996,748	159,129
The Halifax Academy	1,438	9,591,213	9,952,309	361,096	9,952,309	361,096

The North Halifax Grammar School	899	5,163,180	5,472,003	308,823	5,472,003	308,823
Todmorden CofE J, I & N School	204	1,021,993	1,080,813	58,820	1,083,338	61,345
Todmorden High School	891	5,722,976	6,085,052	362,076	6,096,624	373,648
Triangle CofE VC Primary School	191	908,445	961,608	53,163	963,509	55,064
Trinity Academy Akroydon	289	1,469,323	1,552,631	83,309	1,556,972	87,649
Trinity Academy Grammar	931	6,772,976	7,186,778	413,802	7,204,952	431,977
Trinity Academy Halifax	1,605	10,648,015	11,281,082	633,067	11,305,646	657,631
Trinity Academy St Chad's	151	698,072	739,881	41,808	740,784	42,712
Trinity Academy St Peter's	106	637,129	674,456	37,326	676,323	39,194
Tuel Lane Infant School	64	408,694	433,641	24,948	434,418	25,725
Wainstalls School	203	899,201	948,485	49,283	949,574	50,373
Walsden St Peter's CE (VC) Primary School	172	826,115	873,896	47,780	875,801	49,685
Warley Road Primary Academy	451	2,316,835	2,443,556	126,721	2,451,044	134,209
Warley Town School	140	687,641	727,468	39,826	728,825	41,184
West Vale Academy	123	680,321	720,490	40,169	722,292	41,971
Whitehill Community Academy	628	2,912,355	3,084,768	172,413	3,092,251	179,896
Withinfields Primary School	313	1,470,506	1,558,326	87,820	1,561,659	91,152
Woodhouse Primary School	418	1,875,177	1,984,124	108,947	1,984,124	108,947
Total		184,094,131	194,796,991	10,702,860	195,142,647	11,048,516

Schools Forum

Work Programme 2023/24

Prepared by

Paul Tinsley, Interim AD Education and Inclusion

Meeting date	Venue	Reports		Deadline for papers
19th October 2023		Confirm if allocating £2k (previously 1k) to Debby for Governor Support 23/24 due to increased workload	Consultation / Decision	4 th October 12pm
		School Forum Constitution 4 Academy Vacancies - a secondary headteacher, a secondary governor and 2 bursars, appoint another union rep	Discussion	
		Job description and verbal update on SRP – Richard Morse	Consultation	
		Growth Fund report – Jane Davy	Decision	
		Falling Rolls report – Jane Davy	Decision	
		Proposed School Block Transfer – Jane Davy and David Graham	Decision	
		Indicative School Funding 2024-25 report – Jane Davy	Consultation	
11th January 2024		Update on maintained school balances – Jane Davy	View/Information	
25th April 2024				

Meeting date	Venue	Reports		Deadline for papers
Summer TBC				