

Schools Forum

Date: 18 January 2024

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://new.calderdale.gov.uk/schools-and-learning/schools/services-schools/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 Staff Unions	Lisa Davies (National Education Union)
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 19th October 2023**
5. **Early Years Funding Formulae and Centrally Retained Funds 2024/25**
View/Decision **Martyn Sharples**
6. **De-delegation of School Improvement**
Decision **Connie Beirne**
7. **Update on School Funding Formula**
View/Information **Jane Davy**
8. **Growth Fund Update Report**
View/Information **Jane Davy**
9. **Update on Maintained School Balances**
View/Information **Jane Davy**
10. **De-delegation of Unions Facility Fees**
Decision **Lisa Davies**
Jane Davy
11. **Review of Schools Forum Constitution**
Consultation / Decision **Ian Hughes**
12. **High Needs Block Recovery Plan for DfE and Capital Planning and Hub Model Report**
View/Information **David Graham**
Victoria Coyle
13. **Approval of Central Block Expenditure for 2024/25**
Decision **Steve Drake**
Martyn Sharples
14. **Update on Schools Rebuilding Programme**
View/Information **Richard Morse**

15. Any Other Business

Chair

Questions to be submitted a **minimum** 3 days prior to the meeting in writing to:

CalderdaleSchoolsForum@calderdale.gov.uk

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

16. Future Dates

Paul Tinsley

25 April 2024

27 June 2024

All meetings will start at 4pm

Venue: virtual Teams Meeting

CALDERDALE SCHOOLS FORUM
19 October 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)
Brenda Monteith (Roman Catholic)
Gill Shirt (Secondary Governor Maintained)
Joanne Jones (Post 16 Representative)
Mungo Shepherd (Primary Maintained)
Adam McNichol (Primary Governors Maintained)
Dan Burns (Academy Primary)

IN ATTENDANCE:

Paul Tinsley (AD Education and Inclusion)
Jane Davy (Finance Officer)
David Graham (QA and Complaints Consultant)
Steve Drake (Finance Officer)
Ian Hughes (Legal Officer)
Lisa Davies (Unions)
Victoria Coyle (Observing)
Amanda Farron (Observing)

APOLOGIES

Karl Veltman (Post 16 Representative)
Richard Morse (Senior Commissioning Officer – School Organisation and Planning)
Connie Beirne (Interim Service Manager for Early Years and School Strategy and Performance)
Martyn Sharples (Finance Officer)
Denise Gwizdak (Early Years Rep)
Andrea Dyson (Early Years Rep)

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

Joanne Jones for Karl Veltman at Calderdale College

2. **Members Interests** – Members are reminded of the need to declare any interest they might have in relation to the items of business on this agenda.

John Eccleston declared at interest in item 2

Tony reminded the forum he is expressing his views as the Head Teacher from Calder Learning Trust

Karen Morley reminded the forum she is a Governor and part of Together Learning Trust.

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.

Victoria Coyle from Calderdale Councils SEN Team observed.

Amanda Farron from Calderdale Councils Finance Team observed.

4. **Minutes of the Schools Forum held on 22nd June 2023**

Tony highlighted item 9 relating to the underspend of the High Needs Block and is seeking clarity on the underspend and deficit.

Tony raised point 9, the LA report which is to be brought to the next Schools Forum relating to capital planning and the hub model. David Graham has made progress taking this paper to elected members and following their agreement, the report will come to Schools Forum in January. This will also be presented at CASH and CPHA.

Tony raised part 11 relating to the update and changes to Early Years funding. Steve Drake advised he is not aware of this being finalised. Paul Tinsley informed members that there is an additional £55k for the rest of this financial year and Martyn Sharples advised there would be a more substantial sum for the next financial year. The new amount will be brought to the January Schools Forum.

Minutes agreed.

5. **Confirm if Debby Simpson is being allocated £2k (previously £1k) for Governor Support 23/24 due to increased workload.**

Paul presented the item. Debby felt this was a fair reflection of the work she is undertaking for schools forum. John Eccleston commended the work Debby does and supports the proposal.

Vote taken – approved unanimously.

6. School Forum Constitution 4 Academy Vacancies - a secondary headteacher, a secondary governor and 2 bursars, appoint another union representative.

Tony highlighted his term finished in January 2024 (13/01/24) along with Debbie Sweet (13/01/24) and Lisa Davies (28/01/24). There is scope to nominate another potential candidate for Lisa Davies. Ian Hughes will work with Debby Simpson on recruiting to Schools Forum.

Vote taken for Karen Morley and Jo Buckley to act as Vice Chairs until January 2024 – approved unanimously.

The forum will revisit the constitution for Chair and Vice Chair(s) in the January meeting as Karen noticed there are a lot of members of MATs Tony will have a conversation with Ian Hughes to look at the constitution and demographic of schools across Calderdale.

7. Job description and verbal update on SRP

Richard Morse was unable to attend. Paul Tinsley provided an update in his absence. Three posts have been created, one for Fair Access and two for Organisation and Asset Officers for SRP. Paul advised he can pass on the job descriptions which include the grading on to forum members for review. Tony gave permission for Schools Form to review the posts if the job descriptions displayed the costs involved These are to go to advert as soon as possible.

Q: Is anything needed from schools forum?

If schools forum can confirm the original amount set aside for the posts, please can be approved formally for the jobs to be advertised.

Tony advised this has been previously agreed. Paul will send the job descriptions to forum members. Any responses and comments are to be sent to Tony.

Q: Does the indicative amount match the actual?

Yes. Richard has reported the posts are £47k for the Fair Access post and £43k for the two Organisation and Asset Officers.

8. Growth Fund report

Jane calculated a surplus for the year 23-24 which is £23k and is proposing the amount be carried over to 24-25 which schools forum must vote on. If voted against, this funding will presumably go back to the schools block.

Q: The growth funding is not allocated to schools that become popular one year to the next?
That is correct.

Q: Why was Brooksbank less last year?

The growth is paid on actuals, it was expected that Brooksbank would expand in 22/23. However, the numbers didn't materialise due to certain factors. It is expected, after speaking to the academy CFO that they will for 23/24.

Vote to carry forward to the 24-25 growth fund – approved unanimously.

9. Falling Rolls Fund report

In 24/25, for the first time, schools block will receive funding for falling rolls. However, it is expected that Calderdale will not qualify for funding. Jane advised the recommendation is to take from the 23-24 expenditure and ask schools forum to carry forward £73k. This will be allocated to the growth fund 24-25 and therefore, not take from schools block allocation.

Vote taken to carry forward £73k and allocate to the growth fund 24-25 –approved unanimously.

10. Proposed Schools Block Transfer report

Paul Tinsley thanked Jane Davy for the data she provided in the report. The ESFA require Local Authority to provide a rationale and a recovery plan to show how the local authority will stop overspending at the end of a three year period from this year. David Graham has been working on budget recovery report to show how over the next 3 years, the overspend will impact on the HNB. As part of the plans to reduce the current overspend, the local authority are therefore consulting on moving 0.5% from the Schools Block to HNB.

The first time in local authority history, there has been an overspend on the HNB for 22-23 which is £868k. It has been projected it will be a £5 million this year with a cumulative deficit of £6 million. Currently, the HNB overspend figure sits separate to the councils budgets but there has been a suggestion from DfE and ESFA that in 3 years time, the overspend will sit on councils balance sheet and be local authorities responsibility. Paul felt it was necessary to consult on the matter with schools forum and Jane has calculated the like financial impact on schools. Paul advised there is overspending on the early years budget by £500k and overspending in the Specialist Inclusion Team however, by reducing that service, there would be less support to schools. Jane has collated responses from schools to this proposal and included them in her report. If schools forum does not accept the transfer, the local authority could approach the Secretary of State to request the budget is transferred. Around 50% of local authorities have proceeded with this.

Q: If we reject the proposal, what are your other options?

In addition to going directly to the Secretary of State, we also need to seek to reduce overspend by other means and we intend to work with schools in this regard.

Q: Is there anywhere else the money could come from (in theory/legally)?

The local authority is required to have a DSG management plan as we are in deficit which needs to be consulted across stakeholders. Pupil level data and a narrative is required on where our HNB is spent. There is a huge demand on EHCP's which factor into the overspend. There has been an increase in pupils requiring specialist schools for SEMH and placement out of the local authority. The average plan costs £5k and for top up in local provision but for out of area placement this rises to £50k. Prior to the next schools forum the plan will be available to everyone, and a summary of progress will be brought to future schools forum meetings. The local authority is seeking to build more local capacity to reduce dependency on out of area placements. David advised the local authority have signed up for SEND Reform Change Partnership with Wakefield and Yorkshire and the Humber to make the SEND system sustainable.

Q: Do we have any hard facts of those being placed OOA?

The transport costs from the council budget is currently a £2 million overspend. There are 124 placements in independent and non-maintained schools currently which is an increase on last year. David will confirm these figures in the DSG Management Report.

Q: Reading the report there are gaps and information missing. What is the amount moving from the school block to HNB? Will this be £979k based on indicative funding?

The amount is indicative it is 0.5% of the total school block which currently based on indicative figures using Oct 22 data this would equate to £970k.

Q: Then are we only looking for 346k?

No, we are looking for 0.5% in total, after applying the NFF factors the indicative has £600k unallocated so the remaining £346k would have to come by reducing the NFF factors in the funding formula. If we didn't transfer, the £600k would go back into the funding formula and increase some of the NFF values.

Q: When looking at appendix 1 and the impact on schools figures for example, Abbey Park and Brighouse, it doesn't state in appendix 1 how much money schools are going to lose, is this correct?

It is difficult to say what schools would lose as some would not lose money due to already being below the minimum funding guarantee. Some wouldn't lose because they are protected on the minimum per pupil level. Some schools would lose more than others due to the characteristics of the pupil data e.g. FSM, attainment.

Q: Are schools going to be worse off? Will we be taking money from schools who really need it?

It can only go to a minimum amount. This would impact on those primary schools with falling rolls, but they do not get the same amount of funding. Another option would be to take from a lump sum, but this isn't included on the minimum funding guarantee. No one in the consultation had disagreed with this previously.

Phil Hannah suggested the feedback from CASH around the consultation process was flawed as many Head Teachers were not sent the communication directly. Head Teachers had concerns where the money would be taken from and how this would affect school leaders. This went to a vote resulting 4 in favour 8 against. Phil confirmed some of CPHA are included in the numbers who responded to the consultation form. Mungo advised CPHA painted a similar picture to CASH. Head Teachers can see there is a huge need for high needs money to not come from their own schools block but there is no contingency or strategy. Jo Buckley added that primary Heads were very unhappy as they don't feel that the money will fix the problem. The problem is felt to be a lack of a wider strategy. There is a real appetite for the Special School Cluster to have the responsibility for the restructure and running of the Specialist Inclusion Service. 60% of Head Teachers voted against on the consultation survey sent out.

Q: If this is only going to bring in £900K how are you going to find the rest of the overspend? This question was placed in the Teams chat and will be picked up by local authority officers via the DSG Management Plan.

Debbie Sweet feels this needs to sit in a wider strategy. Maintained schools are working for a fraction of the cost with challenging children. She feels that health does not feature enough when having conversations around exclusions and she would like to know how this is monitored.

Q: Why isn't money coming from Health or Social Care when we are looking at additional funding for EHC Plans?

We get a contribution from health, for continuing health care with complex medical needs. Calderdale believes health should contribute more in terms of anxiety and CAMHs.

Tony advised it is difficult to agree to something when a long-term plan is unknown and asked for a breakdown of the spend for narrative for Head Teachers to make a decision. Jane felt the decision should not be based on a monetary amount but rather on principle. Tony highlighted feedback from school 23 in the consultation survey, who made a point around a legal position and that it is the local authorities responsibility to fund EHCP's not schools. Jane explained that children with SEN are funded from HNB and the local authority are following legal requirements. John Eccleston advised that schools forum have a right to vote on the 0.5% transfer to the HNB. It is unlikely heads will vote to lose money when there is still a £5 million deficit happening next year however the vote is decided. He agreed that funding for children with SEND is inadequate.

**Vote taken in favour of recommendation 1 to move the 0.5 % - unapproved 9,
Abstaining – 1**

Tony proposed a recommendation for a local authority officer to meet with a representative from school's forum, CASH, CPHA and the school clusters to look at a long-term strategy. Paul will take this to council leaders.

Paul wanted to explore the comments made around the Specialist Inclusion Team and reminded Schools Forum members that the local authority had statutory responsibilities which were met by the SIT and that SPC had limited capacity in terms of any suggestion that SPC should take over resources currently allocated to SIT. In terms of long-term plan, there is a need to build more local capacity. There is a new room at Highbury School to help support and more SEN hubs have opened. Paul is mindful of DfE financial allocation and exclusions are constantly being on the rise.

11. Indicative School Funding 2024-25 report

School forum members agreed with the recommendations in the report. The local authority will follow national funding back to values based on vote of 0.5%. Jane will bring the figures to the meeting in January. The funding has now been revised to £194 million. MFG are going to keep it at 0.5% if possible. Jane ran the new figures resulting in 5 schools on MFG and 10 on minimum per pupil level.

Q: Is Ash Green school one of the schools for split site funding?

Yes, it is. The figures are available on the SFA website showing just over £80k for Ash Green with it being a split site.

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.

13. Future Dates

11 January 2024

25 April 2024

27 June 2024

All meetings will start at 4pm

Venue: virtual Teams Meeting

Report to Schools Forum

Meeting Date	18 January 2024
Subject	Early Years funding Formulae and Centrally Retained Funds 2024/25
Report Author	Martyn Sharples, Senior Finance Officer

Report purpose

- To inform Schools Forum on the introduction of the Early Years National Funding Formula for the entitlement to early years education and childcare for disadvantaged 2-year-olds and 2-year-olds and under of working parents.
- To consult Schools Forum on planned changes to Calderdale's Early Years Single Funding Formula for the early education entitlement for disadvantaged 2-year-olds, to include childcare for 2-year-olds of working families, and a new formula for the entitlement for 9 months to 2-year-olds of working parents.
- To inform Schools Forum of proposed hourly funding rates paid to schools and early years providers for the existing early years education and childcare entitlements for 2, 3 & 4 year-olds and introduction of hourly funding rates for the new childcare entitlements for 2-year-olds and under 2s of working parents.
- To seek Schools Forum approval of the funding centrally retained from the Early Years Block of DSG in 2024/25.

Need for consideration

Schools Forum to give a view on, the proposed changes to the Early Years Single Funding Formula for the 2-year-old entitlements (for disadvantaged 2-year-olds and 2-year-olds of working parents) and its formula for the new entitlement for 9 months to 2-year-old children of working parents.

Need for decision

Schools Forum to approve the amount and purpose of centrally retained funds.

Contact Officers

Martyn Sharples, Senior Finance Officer – Adult & Children's Services Finance Team
Tel. 01422 392719 or email: martyn.sharples@calderdale.gov.uk

1. Background information and context

1. In July 2023, the Government launched a consultation on Early years funding – extension of the entitlements, setting out its proposals on funding the early years entitlement for 2-year-old and under 2s from 2024/25, including introducing new National Funding Formula and extending the current framework of rules for local authorities when setting their own local funding formulae for disadvantaged 2-year-olds and the new offers for working parents of children aged 2-years-old and under 2s accessing the entitlements from 2024/25. Its response to the consultation was published on 29 November 2023.

[Early years funding – extension of the entitlements - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/early-years-funding-extension-of-the-entitlements)

2. Local authorities must adhere to regulations and should comply with guidance on how the funding for the entitlements should be spent. The existing regulations relates mainly to the 3- & 4-year-olds entitlements and is set out in secondary legislation and operational guidance. The Operational Guide 2024 to 2025 sets out the Changes for 2024-2025.

[Early years entitlements: local authority funding operational guide 2024 to 2025 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/early-years-entitlements-local-authority-funding-operational-guide-2024-to-2025)

3. Further to the Government's proposals, made in its Consultation, it was fully expected that most of these proposals would be introduced without significant change. Therefore, between the 19th October and 12th November, 2023, all funded schools and early years providers in Calderdale were consulted over the proposed local funding formulae for the funded entitlements from April 2024. See Appendix 1.
4. In December 2023, the Authority published its Calderdale provider consultation response alongside the Calderdale Early Years Single Funding Formulae and Provisional Hourly Rates for 2024/25. See Appendix 2.

2. Main issues for Schools Forum

1. The Calderdale provider consultation response and Calderdale Early Years Single Funding Formulae and Provisional Hourly Rate for 2024/25 (Appendix 2) sets out how it is intended to apply the formulae across each of the funding streams and the resultant respective hourly rates.
2. In general, the Government has taken the regulations and guidance that currently applies to the universal and extended entitlements for 3- and 4-year-olds and extended them to cover all of the entitlements to

early years education and childcare. Similarly, in Calderdale we have adopted the established principles and structure of the Early Years Single Funding Formula for 3-and 4-year-olds for all other entitlements. This means that we have chosen to have one formula for the 2-year-old disadvantaged and working parents offers, in the same way that we have one formula for the 3-and 4-year-olds universal and extended offers.

3. In applying the formulae and modelling funding, throughout the implementation of the new entitlement and beyond full implementation in 2026/27, we have planned to avoid volatility in the funding rates paid to schools and early years providers that could have seen significant variations, including falls, in the hourly rates for the new entitlements during the roll-out, due to the staggered introduction of these entitlements.
4. In its consultation on Early Years Funding – extension of the entitlements, the Government acknowledged that local authorities will require additional central spend in order to carry on central activities such as central SEND support, administrative tasks such as eligibility checking and transfers between entitlements. However, as the overall funding local authorities receive in the early years funding increases, the proportion that local authorities will require to centrally retain will fall, whilst still allowing for a higher cash value to be retained, reflecting the increased central activity.
5. In 2024/25, there is no change to the 95% pass-through requirement for 3-& 4-year-olds universal and extended entitlements and this requirement will be extended and applied separately to; 9 months to 2-year-olds of working parents; 2-year-olds of working parents; and 2-year-olds from disadvantaged families. This allows local authorities to retain the remaining 5% across all entitlements, as will be set out in the regulations.

3. Recommendations

1. To centrally retain £852,020 (3.58%) of the total quantum of funding for the early years education and childcare entitlements.

The following table shows a breakdown of the Centrally Retained Funding for 2024/25 compared with 2023/24.

EY DSG Centrally Retained Funding	Budget 2023/24	Budget 2024/25	Comments
IT Systems, Licences & Support	£34,000	£45,000	In 23/24 2YO funding contributed additional £6,000.
Management	£61,780	£105,420	1.0FTE Service Manager up from 0.58FTE
Early Years Improvement	£102,189	£149,860	2.9FTE EYI Officers up from 2.0FTE
Early Years & Childcare Sufficiency	£258,964	£214,811	1.0FTE Senior Officer – Deleted post 2.6FTE Officers 1.0FTE Business Support Officer Expenses & Marketing Costs
Business Support / Finance	£86,123	£108,302	0.75FTE Senior Officer up from 0.5FTE 1.0FTE Finance Officer
Total Planned Central Spend	£543,056	£623,392	
Total Planned Central Spend as % of funding for entitlements	4.3%	2.62%	Regulations applied to only 3- & 4-year-old entitlements in 2023/24 and to all entitlements in 2024/25
Planned transfers between entitlements	£0	£228,628	To be passed-through to providers after transfer has taken place.
Total Centrally Retained Funding	£543,056	£852,020	
Total Planned Central Spend as % of funding for entitlements	4.3%	3.58%	

4. Reasons for recommendations

1. The Government expects local authorities to fund central support services for Early Years and Childcare from the EY Block of DSG and this is reflected in the Finance Regulations. By funding these costs in this way, it brings Calderdale in-line with other local authorities and secures essential central services. The amount determined for 2024/25 reflects a change in the structure of the Early Years and Childcare Sufficiency Team; securing existing Early Years Improvement capacity at risk due to Council budget savings; and additional support from Finance Services.

2. As a result of the staged roll-out of the new entitlements and the way that the regulations are applied to them, it is necessary to transfer funds between entitlements. Funds must be centrally retained to be allowed to transfer between entitlements and are not counted within the pass-through rate even though they will be distributed to schools and early years providers.

5. Impact of funding, targets and milestones

Contained in this report.

6. Resource implications

Indicative Funding 2024/25

Description	Under 2-year-old entitlement	2-year-old Disadvantaged entitlement	2-year-old working parents entitlement	3-& 4-year-old entitlements
Base Rate	£2,528,306	£2,516,604	£3,655,360	£13,445,082
Deprivation Supplement	£25,361	£296,264	£50,056	£355,680
Contingency	£27,130	£29,095	£39,326	£0
Central Spend	£132,190	£67,630	£187,851	£464,349
Total Expenditure	£2,712,987	£2,909,593	£3,932,593	£14,265,111
Provisional Indicative EY DSG Allocation – Dec 2023	£2,712,987	£2,909,593	£3,932,593	£14,265,111

7. Appendices

Appendix 1. Consultation on the Early Years Single Funding Formulae for the funded entitlements to early education and childcare.

Appendix 2. Calderdale provider consultation response and Calderdale Early Years Single Funding Formulae and Provisional Hourly Rates for 2024/25.

APPENDIX 1.

19 October 2023



Consultation on the Early Years Single Funding Formulae for the funded entitlements to early education and childcare.

Funding Streams from 1st April 2024

For 2024/25 there will be 3 Funding Streams:-

- the 3- & 4-year-old universal (15 hours) and extended (15 hours) offers;
- the 2-year-old disadvantaged (15 hours) and working parents (15 hours) offers; and
- the 9 months to 2-year-old working parents (15 hours) offer.

In addition, we expect EYPP and DAF to be extended to eligible children across all entitlements, subject to confirmation by the Department for Education (DfE).

Regulation of Local Authority funding formulae for childcare entitlement

Under the early years entitlements funding system, the DfE distributes funding to local authorities (LAs) who in turn distribute this funding to their providers using their own local funding formulae. In setting their local formulae, LAs must adhere to regulations and should comply with guidance set by the DfE stipulating how funding for the entitlements should be spent.

The existing framework relates to the current 3-and-4-year-old entitlements and is set out in secondary legislation and operational guidance.

The current Early Years National Funding Formula for the existing 2-year-old offer is not subject to regulations regarding the arrangements for the local funding formula, in the same way as for 3- & 4-year old funding. With the introduction of the new entitlement for 2-year-olds of working parents and the significant growth in funding levels, the Government think that the same regulatory framework should be extended across all funding streams to ensure that the majority of the new funding reaches providers.

The key features of the regulatory framework are:-

- Universal Base Rate
- Pass Through Rate
- Supplements (including Mandatory Deprivation Supplement)
- SEN Inclusion Fund (SENIF)
- Early Years Pupil Premium (EYPP) and Disability Access Fund (DAF)
- Contingency Funding

3- & 4-year-old universal (15 hours) and extended (15 hours) funding

Other than for extending EYPP across all entitlements, the Government has not yet proposed any changes to the funding arrangements in 2024/25 for 3- & 4-year-olds. However, as the overall level of funding local authorities receive increases due to the extension of the entitlements, the current minimum pass-through rate of 95% will increase to 97%. In Calderdale, we currently exceed this requirement passing through over 97% and over 101% including SENIF.

Current Early Years Single Funding Formula for the Entitlements for 3- & 4-year-olds Funding Rates for 2023/4.

Description	Hourly Rate / Annual Budget	% of Total EY Funding for 3- & 4-year-old entitlements
Hourly Rate paid to Calderdale	£4.87 ph	100.00
Universal Base Rate	£4.61 ph	94.66
Deprivation Supplement	£0.78 ph	2.80
SEN Inclusion Fund	£500,000 pa	3.96
Contingency	£0 pa	0.00
Pass Through Rate		101.42
Centrally Retained Fund	£543.055 pa	4.30

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass Through Rate, however, the budget for this is not currently funded through EY Funding and this explains why the Pass Through Rate exceeds the total EY Funding. The remaining shortfall in funding is met from underspends from previous years.

Element of Funding	Hourly Rate from 1st April 2023	Uplifted Hourly Rate from 1st September 2023	Hourly Rate from 1st April 2024
Base Rate – 3 & 4 yr old universal entitlement	£4.61	£4.94	TBC
Base Rate – 3 & 4 yr old extended (30hrs) entitlement	£4.61	£4.94	TBC
Deprivation Supplement	£0.78	£0.78	TBC
Early Years Pupil Premium	£0.62	£0.66	TBC
Disability Access Fund	Annual Sum £828	Annual Sum £881	Annual Sum TBC

2-year-old disadvantaged (15 hours) and working parents (15 hours) funding

Proposed Early Years Single Funding Formula for the Entitlements for 2-year-olds and Illustrative Funding Rates (subject to Government confirmation of the Regulatory Framework) for 2024/25.

Description	Illustrative Hourly Rate / Annual Budget	% of Total EY Funding for 2-year-old entitlements
Hourly Rate paid to Calderdale	£7.53 ph	100.00
Universal Base Rate	£6.80 ph	90.31
Deprivation Supplement	£0.78 ph	4.81
SEN Inclusion Fund	£325,000 pa	5.07
Contingency	£64,000 pa	1.00
Pass Through Rate		101.19
Centrally Retained Fund	£162,000 pa	2.53
Reserve c/fwd for 2025/26	£87,000	1.35

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass Through Rate, however, the budget for this is not currently planned to be funded through EY Funding and this explains why the Pass Through Rate exceeds the total EY Funding. The funds held in reserve for 2025/26 are to help meet a shortfall in funding due to the further expansion of the entitlement. The formula will provide for a 97% Pass Through Rate and a balanced budget in 2026/27, following full implementation.

Element of Funding	Hourly Rate from 1st April 2023	Illustrative Hourly Rate from 1st April 2024	Hourly Rate from 1st April 2024
Base Rate – Disadvantaged 2 yr old entitlement (15hrs)	£5.58	£6.80	TBC
Base Rate – 2 yr old entitlement (30 hrs)		£6.80	TBC
Deprivation Supplement		£0.78	TBC
Early Years Pupil Premium		£0.68	TBC
Disability Access Fund	Annual lump Sum £828	Annual Lump Sum £902	Annual Lump Sum TBC

9 months to 2-year-old working parents (15 hours) funding

Proposed Early Years Single Funding Formula for the Entitlements for 9 months to 2-year-olds and Illustrative Funding Rates (subject to Government confirmation of the Regulatory Framework) for 2024/25.

Description	Illustrative Rate / Budget	Hourly Annual	% of Total Funding for Under 2-year-old entitlement
Hourly Rate paid to Calderdale	£10.25 ph		100.00
Universal Base Rate	£9.65ph		110.43
Deprivation Supplement	£0.78 ph		1.12
SEN Inclusion Fund	£83,000 pa		5.01
Contingency	£16,580 pa		1.00
Pass Through Rate			117.56
Centrally Retained Fund	£0.00 pa		0.00

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass Through Rate, however, the budget for this is not currently planned to be funded through EY Funding and this explains why the Pass Through Rate exceeds the total EY Funding. The remaining shortfall in funding is met from underspends from previous years. The formula will provide for a 97% Pass Through Rate and a balanced budget in 2026/27, following full implementation.

Element of Funding	Illustrative Hourly Rate from 1st April 2024	Hourly Rate from 1st April 2024
Base Rate – 9 mth to 2-yr-old entitlement (30 hrs)	£9.65	TBC
Deprivation Supplement	£0.78	TBC
Early Years Pupil Premium	£0.68	TBC
Disability Access Fund	Annual Lump Sum £902	Annual Lump Sum TBC

Consultation Questions

The deadline for submitting your response to the Consultation Questions is Sunday 12th November 2023.

If you have any queries or require further information prior to submitting your response, please contact Martyn Sharples on 01422 392719 or by email at martyn.sharples@calderdale.gov.uk or eef@calderdale.gov.uk.

Follow the link below to complete a Response Form on Microsoft Forms; or email a copy of this form containing your responses to eef@calderdale.gov.uk.

Link to Response Form

https://forms.office.com/Pages/DesignPageV2.aspx?subpage=design&FormId=oi4WBw4bj0m7VVtB_U3OTxTRGOg9AjdIpcI1JYDaGsZURFZROVBZSzA1STFGTTROTUc2TDI5UEIQNCQIQCN0PWcu&Token=cc0af2aa86db4bcda0736b894db6c5a8



Name of Setting:

Type of Setting:

Question 1

Overall, do you agree with our proposed approach of following the same structure as in the existing 3- & 4-year-old Early Years Single Funding Formula for the new formulae for 2-year-olds and 9 months to 2-year-olds? (Subject to the Government extending the existing regulations consistently across all of the early years funding streams.)

☐

Yes

☐

No

Comments:

Question 2

Do you agree to the same eligibility criteria and funding rate for the deprivation supplement being applied across all of the entitlements? (Subject to the Early Years Pupil Premium being extended across all of the entitlements.)

☐ Yes ☐ No

Comments:

Question 3

Do you agree in principle to our proposal to include budgets for SEN Inclusion Funding across the funding formulae for 2-year-olds and Under 2-year-olds, that are reviewed annually? (Subject to the requirement for a SEN Inclusion Fund being extended across the new entitlements.)

☐ Yes ☐ No

Comments:

Question 4

Do you agree to our proposal to include a Contingency budget in the two new funding formulae, amounting to 1% of the total quantum in each funding stream, to help manage fluctuations in take-up particularly in the Spring Terms and during the staged roll-out of the new entitlements? (This amount to be reviewed annually as the level of fluctuations in the new entitlements can be evaluated.)

☐ Yes ☐ No

Comments:

Question 5

Do you agree to our proposal to re-allocate the centrally retained costs across all of the entitlements over time, proportionally based on the indicative number of funded hours in each funding stream.

☐ Yes ☐ No

Comments:

Question 6

Do you have any other comments regarding the local funding arrangements?

Thank You for submitting your responses.

APPENDIX 2.



Early Years Single Funding Formulae for the funded entitlements to early education and childcare Calderdale provider consultation response December 2023

Introduction

The Local Authority consulted with all funded early years providers in Calderdale between the 19th October and 12th November, following the Government's consultation between July and September 2023. This consultation covered proposals for the local arrangements for early years single funding formulae to distribute funding provided through the Early Years Block of the Dedicated Schools Grant (DSG) with full expectation that the Government would proceed with the proposals set out in its own consultation.

The Government consultation response, published in November 2023, confirmed their intention to proceed with all but one of the proposals regarding local funding rules, with the only change being that the deprivation supplement will not be a mandatory requirement within the funding streams for 2-year-olds and under for 2024/25. However, local authorities are encouraged to include a deprivation supplement in their local formulae. The Government also intends to conduct a more detailed review of SENIF arrangements that are currently in place across local authorities nationally and to what extent they are meeting current need.

[Early years funding - extension of the entitlements Consultation response \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

This document presents the Local Authority's response to its consultation and confirms its overall approach to funding the early years entitlements for 2-year-olds and under in Calderdale, from 2024/25. Alongside this consultation response we have published the provisional hourly funding rates for all entitlements for 2024/25. The Local Authority is required to consult with Schools Forum early in the new year after which the hourly funding rates will finally be confirmed.

For further information or advice, contact Martyn Sharples, Senior Finance Officer – Children and Young People's Finance Team at martyn.sharples@calderdale.gov.uk or on 01422 392719.

Responses received and the Local Authority's response

In total, 17 responses were received on-line and by email. The respondents consisted of 4 childminders, 1 childcare on domestic premises, 3 schools and 9 day nurseries and children's centres. Overall, the respondents were in broad agreement with the proposals.

Question 1. Overall, do you agree with our proposed approach of following the same structure as in the existing 3- & 4-year-old Early Years Single Funding Formula for the new formulae for 2-year-olds and 9 months to 2-year-olds? Subject to the Government extending the existing regulations consistently across all of the early years funding streams.

16 respondents (94%) agreed.

The Government is setting out regulations to extend the current framework of rules for the distribution of entitlements funding by local authorities to the existing offer for disadvantaged 2-year-olds and to the new offers for working parents of children aged 2-years-old and under, with minor amendments to give local authorities the option of using one or two formulae for the 2-year-old entitlements and not requiring a mandatory deprivations supplement for the 2-year-old and under entitlements, whilst strongly encouraging the use of a deprivation supplement.

We will proceed as set out in the consultation to have three formulae, one for each funding stream, all following the same structure.

Question 2. Do you agree to the same eligibility criteria and funding rate for the deprivation supplement being applied across all of the entitlements? Subject to the Early Years Pupil Premium being extended across all of the entitlements.

All 17 respondents (100%) agreed.

The Government is proceeding to extend EYPP eligibility to all eligible children aged 2-year-old and under accessing the entitlements from 2024/25.

We will proceed to consistently apply a deprivation supplement across all funding streams to maintain additional support on top of the hourly base rate for the most disadvantaged children, to support their access to the entitlements and to narrow gaps in attainment compared with their peers, as they progress through the early years entitlements.

Question 3. Do you agree in principle to our proposal to include budgets for SEN Inclusion Funding across the funding formulae for 2-year-olds and Under 2-year-olds, that are reviewed annually? Subject to the requirement for a SEN Inclusion Fund being extended across the new entitlements.

14 respondents (82%) agreed. 2 respondents commented that they wanted SENIF to be separate to early years funding.

The Government is setting out in regulations that for 2024/25 local authorities should extend SENIFs to include children aged 9 months to 2 years who are eligible for the funded entitlements. In addition, the Government intends to conduct a detailed assessment of the SENIF arrangements that local authorities currently have in place to disseminate examples of best practice and recommend longer term changes.

We will proceed to extend the access to SENIF to include all children with low or emerging additional needs, that are eligible for the funded early years entitlements. In 2024/25, we will continue to establish a budget for SENIF funded through the High Needs Block to protect the hourly base rate paid to providers for the entitlements, however, this will be reviewed annually.

Question 4. Do you agree to our proposal to include a Contingency budget in the two new funding formulae, amounting to 1% of the total quantum in each funding stream, to help manage fluctuations in take-up particularly in the Spring Terms and during the

staged roll-out of the new entitlements? This amount to be reviewed annually as the level of fluctuations in the new entitlements can be evaluated.

16 respondents (94%) agreed. 1 respondent commented that they would prefer this budget to fund a higher funding rate.

The Government has stated its intention for local authorities to submit termly grant claims in 2024/25 due to the lack of historical data, which will help avoid local authorities being underfunded through inaccurate funding estimates.

We will proceed to include a Contingency budget, amounting to 1% of each of the funding streams for the 2-year-olds and under 2s for 2024/25, due to the uncertainty of take-up in the new entitlements. This Contingency is counted within the pass-through rate and will be used to support payments to providers at some point. This will be reviewed annually.

Question 5. Do you agree to our proposal to re-allocate the centrally retained costs across all of the entitlements over time, proportionally based on the indicative number of funded hours in each funding stream.

16 respondents (94%) agreed.

For 2024/25, the 95% pass-through rate will separately apply to each of the following:

- The 3-and-4-year-old universal 15 hours and working parents 15 hours entitlement (no change)
- The 2-year-old from disadvantaged families entitlement
- The 2-year-old of working parents entitlement; and
- The 9 month to 2-year-old of working parents entitlement.

The Government's intention remains to be to increase the pass-through rate to 97% once the new entitlements are sufficiently embedded.

We will proceed to allocate central support costs in order to comply with the Government's pass-through measures, allocating them to entitlements available at 1 April, delaying new and extended entitlement that commence at 1 September until the following 1 April. We are planning to be able to meet the 97% pass-through rate in the financial year following full implementation.

Question 6. Do you have any other comments regarding the local funding arrangements?

The majority of comments were out of scope of the consultation but were noted, including comments regarding other supplements. However, there was a concern about the impact of having different base rates for each of the funding streams which highlights the need for some business support across most types of provision to adapt and update their business models.

We are working with the Local Authority Delivery Partners to make support and resources available to providers who require assistance to review their current business plan or delivery model or develop a new model in advance of the expansion of the entitlements.

Calderdale Early Years Single Funding Formulae and Provisional Hourly Rates for 2024/25

For 2024/25 there will be 3 Funding Streams –

- the 3- & 4-year-old universal (15 hours) and working parents (15 hours) offers;
- the 2-year-old disadvantaged (15 hours) and working parents (15 hours) offers; and
- the 9 months to 2-year-old of working parents (15 hours) offer.

In addition, EYPP and DAF will be extended to eligible children across all entitlements.

The Local Authority is required to consult with Schools Forum on the changes to the Early Years Single Funding Formulae for all entitlements for 2024/25, after which the hourly funding rates will finally be confirmed.

Early Years Single Funding Formula and Hourly Rates paid to providers for the universal and extended entitlements for 3-&4-year-olds.

Description	Provisional Hourly Rate / Annual Budget	% of Total EY Funding for 3-& 4-year-old entitlements
Hourly Rate paid to Calderdale	£5.47 ph	100.00
Universal Base Rate	£5.22 ph	95.43
Deprivation Supplement	£0.78 ph	2.49
SEN Inclusion Fund	£500,000 pa	3.51
Contingency	£0 pa	0.00
Pass Through Rate		101.43
Centrally Retained Fund	£464,349 pa	3.26

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass Through Rate, however, the budget for this is not currently funded through EY Funding and this explains why the Pass Through Rate exceeds the total EY Funding. The remaining shortfall in funding is met from underspends from previous years.

Element of Funding	Hourly Rate from 1 April 2023	Uplifted Hourly Rate from 1 September 2023	Provisional Hourly Rate from 1 April 2024
Base Rate – 3 & 4 yr old universal entitlement	£4.61	£4.94	£5.22
Base Rate – 3 & 4 yr old working parents entitlement	£4.61	£4.94	£5.22
Deprivation Supplement	£0.78	£0.78	£0.78
Early Years Pupil Premium	£0.62	£0.66	£0.68
Disability Access Fund	Annual Lump Sum £828	Annual Lump Sum £881	Annual Lump Sum £910

Early Years Single Funding Formula and Hourly Rates paid to providers for the disadvantaged 2-year-old and 2-year-old of working parents entitlements.

Description	Disadvantaged 2-year-old		2-year-old of working parents	
	Provisional Hourly Rate / Annual Budget	% of Total EY Funding for disadvantaged 2-year-old entitlements	Provisional Hourly Rate / Annual Budget	% of Total EY Funding for 2-year-old of working parents entitlements
Hourly Rate paid to Calderdale	£7.66 ph	100.00	£7.66 ph	100.00
Universal Base Rate	£7.12 ph	92.95	£7.12 ph	92.95
Deprivation Supplement	£0.78 ph	10.18	£0.78 ph	1.27
SEN Inclusion Fund	£150,000 pa	5.16	£200,000 pa	5.09
Contingency	£29,000 pa	1.00	£39,300 pa	1.00
Pass Through Rate		109.29		100.31
Centrally Retained Fund	£67,630 pa	2.32	£91,413 pa	2.32
Centrally Retained Fund - Transfers			£96,438 pa	2.45

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass Through Rate, however, the budget for this is not currently planned to be funded through EY Funding and this explains why the Pass Through Rate exceeds the total EY Funding. The shortfall in funding for disadvantaged 2-year-olds is being contributed to by transferring funds from other entitlements through the Centrally Retained Funds. Some of the Centrally Retained Funds in the 2-year-old of working parents entitlement are to transfer funds across the entitlements and will be passed through to providers under a different entitlement.

Element of Funding	Hourly Rate from 1 April 2023	Uplifted Hourly Rate from 1 September 2023	Provisional Hourly Rate from 1 April 2024
Base Rate – Disadvantaged 2 yr old entitlement (15hrs)	£5.58	£7.21	£7.12
Base Rate – 2 yr old of working parents entitlement (15 hrs)	N/A	N/A	£7.12
Deprivation Supplement	N/A	N/A	£0.78
Early Years Pupil Premium	N/A	N/A	£0.68
Disability Access Fund	Annual lump Sum £828	Annual Lump Sum £881	Annual Lump Sum £910

Early Years Single Funding Formula and Hourly Rates paid to providers for the 9 months to 2-year-old of working parents entitlements.

Description	Provisional Hourly Rate / Annual Budget	% of Total Funding for Under 2-year-old entitlement
Hourly Rate paid to Calderdale	£10.43 ph	100.00
Universal Base Rate	£9.72ph	93.19
Deprivation Supplement	£0.78 ph	0.93
SEN Inclusion Fund	£80,000 pa	2.95
Contingency	£27,130 pa	1.00
Pass-Through Rate		98.07
Centrally Retained Fund	£0	0.00
Centrally Retained Fund - Transfer	£132,190 pa	4.88

Note: Regulations require the SEN Inclusion Funding to be counted within the Pass-Through Rate, however, the budget for this is not currently planned to be funded through EY Funding and this explains why the Pass-Through Rate plus Centrally Retained Fund exceeds the total EY Funding. The Centrally Retained Funds are to transfer funds across the entitlements and will be passed through to providers under a different entitlement.

Element of Funding	Provisional Hourly Rate from 1 April 2024
Base Rate – 9 mth to 2-yr-old entitlement (15 hrs)	£9.72
Deprivation Supplement	£0.78
Early Years Pupil Premium	£0.68
Disability Access Fund	Annual Lump Sum £910

Centrally Retained Funds 2024/25

In its consultation on Early Years Funding – extension of the entitlements, the Government acknowledged that local authorities will require additional central spend in order to carry on central activities such as central SEND support, administrative tasks such as eligibility checking and transfers between entitlements. However, as the overall funding local authorities receive in the early years funding increases, the proportion that local authorities will require to centrally retain will fall, whilst still allowing for a higher cash value to be retained, reflecting the increased central activity.

In 2024/25, there is no change to the 95% pass-through requirement for 3- & 4-year-olds universal and extended entitlements and this requirement will be extended and apply separately to; 9 months to 2-year-olds of working parents; 2-year-olds of

working parents; and 2-year-olds from disadvantaged families. This allows local authorities to retain the remaining 5% across all entitlements, as will be set out in the regulations.

The Government expects local authorities to fund central support services for Early Years and Childcare from the EY Block of DSG and this is reflected in the Finance Regulations. By funding these costs in this way, it brings Calderdale in-line with other local authorities and secures essential central services. The amount determined for 2024/25 reflects a change in the structure of the Early Years and Childcare Sufficiency Team; securing existing Early Years Improvement capacity at risk due to Council budget savings; and additional support from Finance Services.

As a result of the staged roll-out of the new entitlements and the way that the regulations are applied to them, it is necessary to transfer funds between entitlements. Funds must be centrally retained to be allowed to transfer between entitlements and are not counted within the pass-through rate even though they will be distributed to schools and early years providers.

The following table shows a breakdown of the Centrally Retained Funding for 2024/25 compared with 2023/24.

EY DSG Centrally Retained Funding	Budget 2023/24	Budget 2024/25	Comments
IT Systems, Licences & Support	£34,000	£45,000	
Management	£61,780	£105,420	1.0FTE Service Manager up from 0.58FTE
Early Years Improvement	£102,189	£149,860	2.9FTE EYI Officers up from 2.0FTE
Early Years & Childcare Sufficiency	£258,964	£214,811	1.0FTE Senior Officer – Deleted post 2.6FTE Officers 1.0FTE Business Support Officer Expenses & Marketing Costs
Business Support / Finance	£86,123	£108,302	0.75FTE Senior Officer up from 0.5FTE 1.0FTE Finance Officer
Total Planned Central Spend	£543,056	£623,392	
Total Planned Central Spend as % of funding for entitlements	4.3%	2.62%	Regulations applied to only 3-& 4-year-old entitlements in 2023/24 and to all entitlements in 2024/25
Planned transfers between entitlements	£0	£228,628	To be passed-through to providers after transfer has taken place.
Total Centrally Retained Funding	£543,056	£852,020	
Total Planned Central Spend as % of funding for entitlements	4.3%	3.58%	

Report to Schools Forum

Meeting Date	18 January 2024
Subject	Delegation of School improvement functions
Report Author	Connie Beirne Interim Service Manager for Early Years, Schools Strategy and Performance

Report purpose

- To provide members with a clear understanding of the LA's statutory duty towards our maintained schools causing concern; of which the School Improvement and Monitoring and Brokerage grant (SIMBG) which supported the delivery of this function is no longer in place from 1 April 2023.
- To provide members of the schools Forum, with possible models of delivery during 2023/24 (1 year) or 2024 to 2026 (2 years) to enable the LA to continue to deliver this statutory function for our primary maintained schools.
- For members to be able to make an informed decision based upon the provided costed models of delivery

Need for consideration

The effective use of maintained schools' funding in securing the local authority school improvement function through a robust and rigorous delivery model

Need for decision

- Information is provided to support decision making by Schools Forum about future delivery and funding for the statutory school improvement function Calderdale needs to deliver to our primary maintained Schools causing concern.
- Agreement to de-delegate the funds required from the maintained schools' budget for 2024/25 or for two years 2024 to 2026.

Contact Officers

Paul Tinsley– Interim Assistant Director: Education and Inclusion
Paul.tinsley@calderdale.gov.uk

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

Background information and context

- a) The latest guidance is effective from 11 July 2023 and sets out the factors LAs and Regional Directors will consider, and the process they will follow in order to decide the right approach to supporting a school to improve.
https://assets.publishing.service.gov.uk/media/64a6d7d0c531eb001364ffba/Schools_causing_concern_guidance.pdf
- b) Section 72 of the Education and Inspections Act 2006 places a statutory duty on all LAs in England, in exercising their functions in respect of maintained schools causing concern, to have regard to any guidance given from time to time by the Secretary of State. This applies to:
- Maintained 'schools causing concern' (within the meaning of section 44 of the Education Act 2005).
 - Maintained schools that are 'eligible for intervention' (within the meaning of Part 4 of the Education Act 2006).
 - Other Maintained schools about which the Local authority and/or Secretary of State have serious concerns which need to be addressed; and
 - Academies causing concern
- c) Under the current Schools causing concern guidance, a local authority must exercise its education functions **with a view to promoting high standards**. Our School Improvement Strategy 2023-24 is available from Carolyn.rooke@calderdale.gov.uk. Local authorities should also act as **champions of high standards of education** across maintained schools in their area, and in doing so should:
- Understand the performance of maintained schools in their area, using data as a starting point to identify any maintained school that is underperforming, while working with them to explore ways to support progress;
 - Work closely with the relevant RD, diocese and other local partners to ensure maintained schools receive the support they need to improve;
 - Where underperformance has been recognised in a maintained school, proactively work with the relevant RD, combining local and regional expertise to ensure the right approach, including sending warning notices, and using intervention powers where this will improve leadership and standards; and
 - Encourage Good and Outstanding maintained schools to take responsibility for their own improvement; support other maintained schools; and enable other maintained schools to access the support they need to improve.
- d) From 2022- 23, local authorities were permitted to de-delegate from maintained schools' budget shares to fund this core school improvement activity. As set out above, these core school improvement activities extend beyond exercising of statutory intervention powers but do not extend to a duty to provide or fund school improvement services themselves; and relate only to schools they maintain, rather than academies which are accountable to the Secretary of State.

- e) **Local Authority Responsibilities:** As set out above, Calderdale Local Authority has a statutory duty to monitor the effectiveness of all schools in its area (including academies and free schools) working with the Regional Director. It targets its resources on those schools which need further support or challenge to secure improvement.
- f) The Local Authority is also responsible for identifying poorly performing schools and providing or brokering early and effective support in order to prevent schools becoming those defined as 'schools not making necessary improvements.'
- g) Based upon our present risk assessment of Green (no concern), Amber (of concern to the LA) and Red (Of high concern to the LA). There are presently (December 23), 2 red and 14 amber-maintained schools. (16 in total) There is an increased level of support for amber schools at up to three days allocation of support per term and for red schools up to four days of support per term.
- h) Risk assessments of all our schools (maintained and academies) are fluid and this means that following support from our SE team members or an ofsted inspection, discussions with CEO's and/or the Diocese, risk ratings can alter. This will be agreed between the LA, headteacher and chair of governors at the school. During the autumn term, following publication of their ofsted report, one amber maintained school was risk assessed as Green and one academy. This means the associate who was working with the maintained school, is now released and available should we need them, to undertake other SE work going forward. However, two maintained schools continue to be risk assessed as red at the end of this term, due to the significant concerns displayed.
- i) As members will be aware from previous reports, the existing School Effectiveness team is made up of an interim Service Manager, a part time School effectiveness officer and eight associates – six are existing headteachers in our schools. The remaining two are consultants who have worked in/with our schools previously. All are highly skilled with considerable experience and expertise between them. There are three ofsted inspectors in the team. This has been recognised and appreciated by those heads, whose schools are of concern and by other staff in our schools attending the primary Subject Leader development programme and those undertaking the new NPQ qualifications.
- j) Feedback from SE associates and the headteachers they are working with continues to be very positive. Last year, as evidenced from our work, there was a 60% reduction in maintained schools causing concern. We are successful as we: provide a consistent associate to work with a school, we work in partnership, rapid support and improvements are made and 'Team around the school' meetings enable all the support to be tracked which is beneficial to all involved. We are fortunate to have this team and continue to get requests from retiring headteachers and other consultants to work with us. As we progress during the year, we see numbers reducing, as schools

continue to move from the risk assessment of amber/red back to green as well as a small number of schools joining a MAT. Calderdale had 46 Ofsted inspections last year, with 91% of schools remaining good and outstanding. At the moment, there are seven maintained schools (includes two secondary) who will be converting to academy status no later than the 1 September 2024.

- k) We have had, thirteen ofsted inspections this term and are pleased with school outcomes as reports are published confirming their judgements. So far, four outstanding and six good schools, with three of these moving from RI.
- l) Calderdale performance outcomes 2023 are strong with KS2 results all above national. GLD almost matching national, Phonics results above national, KS1 results increasing and not far from national. As well as strong outcomes at both KS4 and 5.
- m) As a team, we work closely with our Kirklees and Calderdale Teaching School Hub (C&KTSH) as well as our curriculum hubs of English, maths and Music and our research school.
- n) We continue to respond to queries from our academies and offer signposting to those particularly in difficulty. Support, training and advice also comes out of the successful cluster model in place in Calderdale where funding is provided for both academies and maintained schools to work in partnership.
- o) A consultant working as part of the team continues to deliver the new Headteachers support package/network/mentor for up to 20 new headteachers including 7 Secondary autumn term 23 onwards, which is now funded by school clusters. Feedback so far from new heads, is very positive and they can access the immediate information and support necessary. Headteacher wellbeing also features within our school clusters priorities. Nationally, 85% of leaders are found to be stressed and leaving the profession sooner. (NEU 2023)
- p) In terms of costings, it was agreed that SE associates would receive a daily rate of £550, for the work undertaken.
- q) This SE associate model also sits well with the SI cluster model which both academies and maintained schools' benefit from. The cluster model continues to play a significant role in delivering School Improvement on behalf of the LA. Real strength and impact continues to be seen through the impact cluster reports sent to the School Improvement Partnership Board.
- r) Our highly successful Primary Subject Leaders development programme, funded directly by our schools, continues to be delivered by existing Headteachers, including some SE Associates from within the borough. This supports and reinforces the system leadership model of providing school to school support.

- s) During autumn 23 and spring term 2024, we were awarded funding to provide one day of support to our Green maintained schools (33). This has been successful and Headteachers have appreciated this support. We have attempted to make the support provided be-spoke. For example, one green school identified early years as their priority; so, we organised for an EY specialist to attend the setting for the day. Although Green risk assessed (33 at present), schools can become vulnerable due to changes in leadership, ofsted grading, staffing, safeguarding etc... From experience, the schools that are often more vulnerable within an LA, are those that are outstanding and remained uninspected for a considerable period of time and those that have retained good for a significant period. One of our green maintained schools, following the one-day green visit is now amber as it needs additional support, and this was agreed by both the school and LA.

Main issues for Schools Forum

Need for consideration

- a) The funding for the School Effectiveness team available through the School Improvement Monitoring and Brokerage Grant (SIMBG) ceases in March 2023; so, funding will be dependent upon the model chosen with funding to come out of the maintained schools' budget 2024/25.
- b) The Local authority are unable to increase funding to the service from its base budget. The 2024/25 budget setting process is currently taking place, there is already severe pressure on the current year budget & the allocation made to us by the Government for 2024/25 & future years will mean budget savings will have to be found within the Children & Young Peoples Directorate & by the Council as a whole meaning there will be no capacity to increase budgets. (Steve Drake, Finance Manager)
- c) As shared at previous meetings earlier this year, following the successful SE Associate model, it would make sense for this to continue for at least one year. However, if a two-year funding proposal was considered this would provide additional stability for our primary maintained schools as well as the now successfully established School Effectiveness team members.
- d) It is ill-advised to no longer fund a successful team who are working effectively to improve our schools. We are presently at 84% good and outstanding schools compared to national at 89%. This would be most unsettling for our headteachers of schools in a vulnerable position.
- e) Consideration also needs to be given to the reducing number of maintained schools causing concern joining a MAT.
- f) A review of the role of the Service Manager for Early years, school strategy and performance have been undertaken as recruitment has not been successful to this post. This has resulted in this post being broken down into two separate service manager posts- one for early years and the other for

education. The posts are advertised, and we hope to recruit to both posts by February 2024, at the latest. The interim post holder's contract has been extended to March 2024.

- g) A School Effectiveness options appraisal exercise has been undertaken. The existing team continue to bring in traded income through undertaking Headteacher's performance management, data agreements, commissioned work, cluster officer post and School reviews. However, despite this amounting to around **£54K**, much of this is spent on staffing and our monitoring and moderation statutory assessment duties. The team will continue to publish this School Improvement offer for 2024/25, open to all Calderdale schools.
- h) The available budget for the School Effectiveness team in 2024/25 is **£53,720K** and includes:
 - **£32,720K** LA base budget
 - **£21K** traded income provided through commissioned work undertaken in both maintained and academy schools. This includes Headteacher Performance Management, School Reviews, presenting your school well, coaching sessions, including governors and other requested curriculum, subject leaders focused work we are asked to support on. This amount is based upon previous year's income; so, we are secure that this amount is realistic to be achieved and support the team going forward.
- i) We are unable to provide the amount per pupil for our primary schools for each model at the time of submitting this report. We hope to be able to share these costs at the meeting in January 2024.
- j) **Equalities impact statement.** The majority of schools causing concern are in levels of high deprivation with higher numbers of children who are disadvantaged as well as those with SEND. Out of the thirty-two schools (Maintained (15) and Academies (17), all are within the most deprived areas of Calderdale, including Ovenden, Illingworth and Mixenden, Warley, Todmorden and Sowerby Bridge. With the pandemic, the gap has widened for our vulnerable pupils. Putting resources in at the right place, right time will ensure the child's needs are met, so they can go on to meet their full potential.

Optional Delivery models

- a) Suggested **model 1** for delivery April 2024 – March 2026 (2 years) (**Please note:** Salaries based upon a 4.5% in 24/25 followed by 3.5% in 25/26, then NI and SUPAN has been taken into consideration any scale point increases, before finally applying the overhead recovery charge for central support costs to reach full costs).

- Staffing: Service Manager for Education Quality and Strategy (£213,929K), 0.6 SEO (£122,342K), full time BSO (£79,685K), 6 associates (£165K). Red schools continue to get up to 4 days of support and amber continue to get up to 3 days of support per term and maintained green schools (33) x 1 day support across the academic year (£36,300K).

Total costs = £ 617,256 (LA amount = £107,440) (amount requested to be de-delegated = £509,816 by Schools Forum)

b) Suggested model 2 for delivery April 2024 – March 2025 (1 year)

- Staffing: Service Manager for Education Quality and Strategy (£104,360K), 0.6 SEO (£60,093K), full time BSO (£39,694), associates to support red schools to get up to 4 days of support and amber to get up to 3 days of support per term (82,500K) and maintained green schools (33) x 1 day support across the academic year (£18,150K).

Total costs = £304,797 (LA amount = £53,720K) (amount requested to be de-delegated = £251,077 by Schools Forum)

c) Suggested model 3 for delivery April – March 2025 (1 year) (no green schools support)

- Staffing: Service Manager for Education Quality and Strategy (£104,360K), 0.6 SEO (£60,093K), full time BSO (£39,694K), associates to support red schools to get 4 days of support and amber to get 3 days of support per term (£82,500K).

Total costs = £286,647 (LA amount = £53,720K) (amount requested to be de-delegated = £232,927 by Schools Forum)

NB if this model were to be chosen, green schools would need to receive their required support via the SI cluster model arrangements as detailed in the partnership framework document – October 2023.

Recommendations

-) For School Forum members to recognise the successful delivery of the LA school improvement function during the academic year 2022/23, involving a smaller number of officer input as well as SE associates and look to continue to support and fund this model going forward into 2024 to provide the stability needed for our schools causing concern and address our statutory duties.
- a) For School Forum members to agree to de-delegate funds from the maintained schools' budget to **support model 1** going forward. As this model, provides the best support for the maintained schools causing concern as well as those that are risk assessed as green and gives stability to schools

and team members to deliver on this statutory duty for the **next 2 years**.
Total costs to fund this model = £ 617,256 (LA amount = £107,440) (**amount requested to be de-delegated = £509,816 by Schools Forum**)

- b) In choosing **model 2**, there is the same level of support for our schools causing concern with an offer to our green schools. In choosing **model 2**, the schools causing concern continues to be the sole focus of the team's work.
Total costs = £304,797) (LA amount = £53,720K) (**amount requested to be de-delegated = £251,077 by Schools Forum**)

In choosing **model 3**, there is the same level of support for our schools causing concern without an offer to our green schools. **Total costs** = £286,647 (LA amount = £53,720K) (**amount requested to be de-delegated = £232,927 by Schools Forum**)

- c) For School Forum members to consider the changing educational landscape and the need to work in partnership with all stakeholders to delivery the best education for all the borough's children. To ensure that all providers are available to support our schools, so we can continue to move from a rating of 83% good or better schools nearer to the national figure of 88%.

Reasons for Recommendations

- a) For a decision to be taken on a chosen model, so the necessary changes, required can be put in place ahead of a 1 April 2024 start date.
- b) For a decision to be made, on the funding through the maintained schools' budget of the future chosen delivery model for the summer term 24 onwards.

Resource implications

- a) All professionals, funding and resources to be in place by 1 April 2024 for the summer term onwards. Appointments made to the two new service manager posts.

Report to Schools Forum

Meeting Date	18 January 2024
Subject	School Funding Formula 2024/2025
Report Author	Jane Davy

Report purpose

To inform Schools Forum of the Individual School Budget Shares (ISB) calculated through the funding formula and the final DSG Schools Block allocation

Need for consideration

At the time of writing the report the LA are still awaiting the decision of the Secretary of State on the transfer of 0.5% from the Schools Block to the High Needs Block. This report has been written with three options for members to consider.

Need for decision

Schools Forum will be asked to vote on the use of the £599k surplus if the request to transfer 0.5% to the High Needs Block has not been upheld by the Secretary of State.

Contact Officers

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Report to Schools Forum

1. Background information and context

In October 2023 Schools Forum was consulted on the proposals for the Funding Formulae for 2024/25.

The proposal to follow the NFF funding factors and values was agreed in principle with officers reporting on the final funding Formulae in January 2024. Forum members were also in agreement with the disapplication requests for MFG and MFFL adjustment.

The Local Authority has to submit final allocations to the ESFA for approval no later than the 22 January 2024. Upon ESFA approval the LA will inform maintained mainstream schools of their individual allocations no later than 28 Feb 2024. Academies will receive their allocation from the ESFA based on the local formulae in March 2024.

2. Main issues for Schools Forum

a) Final Schools Block DSG Allocation

The ESFA announced the final allocation on the 19 Dec 2023.

Calderdale have received £192.5m for the schools block, an increase of £8.2m million from 2023/24. When you include the mainstream schools additional grant for 23/24 of £6.2m and the adjustment to pupil numbers - £2.1m for a decrease of 413 pupils (-424 Primary and +11 Secondary) the total increase equates to £4.1m.

Information of DSG allocation is available on the ESFA website, below is an analysis of how the Schools Block is calculated

	£M
Primary pupils	92.23
Secondary pupils	96.33
Rates	1.89
Split Site	0.31
PFI	1.20
Growth/Falling Rolls	0.56

b) Mainstream Individual School Funding Allocations

Calderdale has £192.4m to allocate through the funding formula, this is after retaining £100K for the growth fund (the amount has been reduced by £13k from what was agreed at the October meeting). No funding is required for falling rolls due to no schools being eligible. With growth fund being agreed in principle It is expected that School Forum members will agree the reduction to Growth Fund when discussing the growth fund paper (agenda item XX)

After running the formula based on the agreed factors and values i.e the national funding factors and values as set out at October School Forum there is a surplus of £599k. £460k is surplus from growth and falling rolls and £139k from the remaining schools block.

The LA has three options;

- To run the funding formula with the NFF values as agreed at the Oct 23 School Forum meeting , see the table below and use the above surplus of £599k to move to the High Needs Block.
- To run the funding formula incorporating the £599k surplus , this will increase the Basic Entitlement values by the following amounts;
KS1 £20.13
KS2 £28.15
KS3 £32.04
All other factors and values will remain the same.
- If the Secretary of State agrees to the transfer of the 0.5% transfer the LA will use the £599k surplus and reduce the funding formula by a further £363k by reducing the basic entitlement values by the following amounts
KS1 -£12.70
KS2 -£17.85
KS3 -£19.96
All other factors and values will remain the same

If the Secretary of State agrees to the transfer of 0.5% the LA will apply option 3, School Forum members will not need to vote. However, if the Secretary of State rejects the request members will be asked to vote on Option 1 or 2

Impact of all three options are shown in Appendix A

The NFF factors and values are shown in the table below, MFG will remain at 0.5% and no capping will be applied.

	2023/24		2024/25	
	Primary	Secondary	Primary	Secondary
Basic Entitlement				
KS1&2	3394.54		3,562.61	
KS3		4785.77		5022.85
KS4		5,393.86		5,661.96
Deprivation				
FSM	480.08	480.08	490.08	490.08
FSM6	705.11	1030.16	820.14	1200.20
IDACI A	670.11	930.15	680.12	945.16
IDACI B	510.08	730.12	515.09	740.13
IDACI C	480.07	680.11	485.08	690.12
IDACI D	440.07	620.10	445.08	630.11
IDACI E	280.04	445.07	285.05	450.08
IDACI F	230.04	335.04	235.04	340.06
Attainment	1,155.18	1,750.28	1,170.20	1,775.3
EAL	580.09	1,565.25	590.10	1,585.27
Mobility	945.15	1,360.22	960.16	1,380.23
Lump Sum	128,020.48	128,020.48	134,422.85	134,422.85

The disapplication requests have been approved by the ESFA , after running the formula it was found that only the MFG adjustment for The Halifax Academy needs to be applied to the funding formula.

An impact assessment of the proposed funding formula options is shown at Appendix A

In addition to the DSG Schools Block the government have announced that schools will continue to receive the Teachers Pay Grant for 24/25.

Calderdale have been notified of an indicative amount of £3.2m for mainstream schools. The ESFA will publish Individual school allocations in May 2024. There will also be an additional grant for 2024 to 2025 to reflect the additional costs of the increase to the employer contribution rates to the Teachers Pensions' Scheme from April 2024. Further details will be announced in due course.

The additional funding will be incorporated into the schools national funding formula (NFF) for 2025 to 2026.

Finally, there will be an increase in the Pupil Premium rates from April 24 as detailed below;

Primary FMS6 pupils £1,480
Secondary FMS6 pupils £1,050
Looked after Children £2,570
Service pupils £340
Children who have ceased to be looked after £2,570

Recommendations

- a) If the Secretary of State rejects the request to transfer 0.5% to the high needs block, members to vote on Option 1 or Option 2.
- b) If the Secretary of State approves the request to transfer 0.5% to the high needs block to note Option 3
- c) To note the additional grants and the increase to Pupil Premium

3. Impact of funding, targets and milestones

See Appendix A

4. Resource implications

The total Schools Block DSG allocation of £192.4m will be allocated to schools through the Funding Formulae, Growth Fund and possible transfer to High Needs Block.

5. Appendices A

School Name	2023/24		2024/25							
	Pupil Numbers	Funding Formula	Pupil Numbers	Pupil Number inc/dec	Option 1	difference in funding increase/decrease	Option 2	difference in funding increase/decrease	Option 3	difference in funding increase/decrease
Ferney Lee Primary School	181	1,021,429	186.00	5	1,085,844	64,415	1,089,591	68,162	1,083,747	62,319
Copley Primary School	289	1,310,211	302.00	13	1,429,386	119,175	1,429,386	119,175	1,429,386	119,175
Savile Park Primary School	364	2,293,878	370.00	6	2,398,033	104,155	2,398,033	104,155	2,398,033	104,155
Northowram Primary School	405	1,821,401	416.00	11	1,955,136	133,735	1,955,136	133,735	1,955,136	133,735
Parkinson Lane Community Primary School	524	2,793,036	499.00	-25	2,760,473	-32,563	2,760,473	-32,563	2,760,473	-32,563
Salterhebble Junior and Infant School	209	1,002,101	204.00	-5	1,027,344	25,243	1,031,453	29,353	1,024,754	22,653
Warley Town School	140	687,641	134.00	-6	706,355	18,713	709,054	21,412	704,653	17,012
Ling Bob Junior, Infant and Nursery School	306	1,695,584	294.00	-12	1,699,141	3,558	1,699,141	3,558	1,699,141	3,558
Bailiffe Bridge Junior and Infant School	198	916,013	192.00	-6	927,814	11,802	931,682	15,669	926,324	10,311
Carr Green Primary School	312	1,446,744	308.00	-4	1,484,968	38,225	1,489,383	42,640	1,484,968	38,225
Withinfields Primary School	313	1,470,506	301.00	-12	1,507,668	37,161	1,513,731	43,225	1,503,847	33,340
Holywell Green Primary School	166	835,877	157.00	-9	838,245	2,368	841,408	5,530	836,252	375
Central Street Infant and Nursery School	59	377,598	72.00	13	457,524	79,926	458,974	81,376	456,610	79,012
Stubblings Infant School	33	256,313	41.00	8	301,638	45,325	302,464	46,151	301,118	44,804
Colden Junior and Infant School	77	477,747	74.00	-3	483,446	5,699	484,937	7,190	482,507	4,759
Shelf Junior and Infant School	257	1,148,583	239.00	-18	1,133,698	-14,886	1,138,512	-10,071	1,130,664	-17,920
Ripponden Junior and Infant School	195	922,628	182.00	-13	903,634	-18,994	906,963	-15,666	903,634	-18,994
Midgley School	95	509,297	71.00	-24	431,877	-77,420	431,877	-77,420	431,877	-77,420
New Road Primary School	162	860,271	174.00	12	961,583	101,312	965,088	104,817	959,374	99,103
Tuel Lane Infant School	64	408,694	57.00	-7	412,076	3,383	413,225	4,531	411,353	2,659

Castle Hill Primary School	182	882,777	168.00	-14	874,296	-8,481	877,680	-5,097	872,163	-10,614
Cornholme Junior, Infant and Nursery School	148	832,175	143.00	-5	854,117	21,942	856,997	24,823	852,301	20,127
Shade Primary School	178	854,222	158.00	-20	827,502	-26,720	830,685	-23,537	825,496	-28,726
Old Town Primary School	71	403,702	78.00	7	447,614	43,912	449,186	45,483	446,624	42,922
Cliffe Hill Community Primary School	169	953,540	161.00	-8	955,127	1,587	958,370	4,830	953,083	-457
Woodhouse Primary School	418	1,875,177	418.00	0	1,960,867	85,690	1,960,867	85,690	1,960,867	85,690
Riverside Junior School	143	700,592	126.00	-17	661,072	-39,520	663,610	-36,982	659,511	-41,081
Cross Lane Primary and Nursery School	305	1,546,479	300.00	-5	1,595,756	49,277	1,601,799	55,320	1,591,947	45,469
Ash Green Community Primary School	404	2,290,166	411.00	7	2,543,776	253,610	2,552,055	261,889	2,538,558	248,392
Christ Church Pellon CofE VC Primary School	168	978,173	167.00	-1	1,058,145	79,973	1,061,510	83,337	1,056,025	77,853
Norland CE School	76	432,050	75.00	-1	456,233	24,182	457,743	25,693	455,280	23,230
St Mary's CofE (VC) J and I School	98	507,834	87.00	-11	487,559	-20,275	489,312	-18,523	486,455	-21,380
Triangle CofE VC Primary School	191	908,445	186.00	-5	925,206	16,761	928,953	20,508	922,845	14,400
St Andrew's CofE (VA) Junior School	208	1,019,293	221.00	13	1,131,391	112,098	1,135,843	116,550	1,128,585	109,293
St Andrew's Church of England (VA) Infant School	166	834,599	162.00	-4	850,097	15,498	853,053	18,454	850,097	15,498
Elland Church of England (Voluntary Aided) Junior, Infant and Nursery School	160	974,185	142.00	-18	944,614	-29,571	947,475	-26,711	942,811	-31,374
Hebden Royd CofE VA Primary School	92	479,434	96.00	4	526,896	47,461	528,830	49,395	525,677	46,243
Barkisland CofE VA Primary School	194	857,782	191.00	-3	883,722	25,940	883,722	25,940	883,722	25,940
Christ Church CofE VA Junior School, Sowerby Bridge	110	618,570	93.00	-17	565,066	-53,503	565,066	-53,503	565,066	-53,503
Todmorden CofE J, I & N School	204	1,021,993	200.00	-4	1,053,840	31,847	1,057,869	35,876	1,051,301	29,308
Moorside Community Primary School	207	1,207,198	210.00	3	1,285,442	78,244	1,289,672	82,474	1,282,776	75,578
All Saints' CofE Primary School	212	937,253	211.00	-1	976,103	38,850	976,103	38,850	976,103	38,850
St Michael and All Angels CofE Primary & Pre School	188	877,778	181.00	-7	900,222	22,444	903,868	26,091	897,924	20,147
Longroyde Primary School	374	1,707,755	357.00	-17	1,796,859	89,104	1,804,051	96,296	1,792,327	84,572

Walsden St Peter's CE (VC) Primary School	172	826,115	174.00	2	865,213	39,097	867,973	41,858	865,213	39,097
Todmorden High School	891	5,722,976	875.00	-16	5,899,776	176,800	5,925,741	202,766	5,883,433	160,458
The Calder Learning Trust	1370	8,218,402	1,345.00	-25	8,457,681	239,279	8,496,869	278,467	8,433,025	214,623
Field Lane Primary School	99	631,298	86.00	-13	589,000	-42,298	589,000	-42,298	589,000	-42,298
Trinity Academy Akroydon	289	1,469,323	257.00	-32	1,397,651	-71,672	1,402,828	-66,494	1,394,388	-74,934
Mount Pellon Primary Academy	294	1,599,347	269.00	-25	1,537,797	-61,550	1,543,216	-56,131	1,534,382	-64,965
Bradshaw Primary School	331	1,463,363	326.00	-5	1,517,402	54,039	1,523,969	60,606	1,513,263	49,900
Abbey Park Academy	197	1,059,864	187.00	-10	1,075,968	16,104	1,079,735	19,871	1,073,594	13,730
Lee Mount Primary School	307	1,661,046	288.00	-19	1,645,996	-15,050	1,651,798	-9,248	1,642,340	-18,706
Dean Field Community Primary School	199	1,116,123	201.00	2	1,173,338	57,215	1,177,387	61,265	1,171,964	55,841
West Vale Academy	123	680,321	101.00	-22	619,871	-60,450	621,905	-58,416	618,588	-61,732
Beech Hill School	461	2,519,039	461.00	0	2,608,513	89,474	2,608,513	89,474	2,608,513	89,474
Trinity Academy St Chad's	151	698,072	141.00	-10	707,572	9,500	710,412	12,340	705,782	7,710
Wainstalls School	203	899,201	199.00	-4	943,474	44,272	947,482	48,281	940,947	41,746
Warley Road Primary Academy	451	2,316,835	441.00	-10	2,353,104	36,269	2,356,474	39,639	2,353,104	36,269
St Joseph's Roman Catholic Voluntary Academy	122	712,708	109.00	-13	680,108	-32,601	682,304	-30,405	678,724	-33,984
Whitehill Community Academy	628	2,912,355	617.00	-11	3,038,565	126,211	3,050,995	138,640	3,030,733	118,378
Trinity Academy St Peter's	106	637,129	104.00	-2	661,453	24,324	663,549	26,419	660,133	23,004
St Augustine's CofE School	146	888,742	159.00	13	1,065,815	177,073	1,069,018	180,277	1,063,797	175,055
Bowling Green Academy	145	708,894	151.00	6	774,735	65,841	777,776	68,883	772,818	63,924
The Greetland Academy	410	1,837,619	398.00	-12	1,922,178	84,559	1,922,178	84,559	1,922,178	84,559
Burnley Road Academy	180	880,550	171.00	-9	903,742	23,192	907,187	26,637	901,572	21,022
Scout Road Academy	100	506,551	99.00	-1	529,499	22,948	531,493	24,942	528,242	21,691
Bolton Brow Primary Academy	210	964,673	211.00	1	1,017,114	52,441	1,021,365	56,691	1,014,435	49,762
Luddendenfoot Academy	191	850,535	193.00	2	906,278	55,743	910,166	59,631	903,828	53,293
Old Earth Primary School	412	1,840,501	420.00	8	1,958,508	118,007	1,966,969	126,468	1,953,176	112,675
Siddal Primary School	183	983,308	170.00	-13	981,318	-1,990	984,742	1,435	979,160	-4,148
St Joseph's Catholic Primary Academy	164	808,368	150.00	-14	820,580	12,213	823,602	15,234	818,676	10,309

St Malachy's Catholic Primary School, A Voluntary Academy	148	912,974	150.00	2	960,574	47,601	960,574	47,601	960,574	47,601
St Mary's Catholic Primary Academy	303	1,533,310	303.00	0	1,593,398	60,088	1,599,502	66,192	1,590,584	57,274
St John's Primary School In Rishworth	144	664,402	145.00	1	699,324	34,922	702,245	37,843	697,483	33,081
St Patrick's Catholic Primary Academy	101	558,418	95.00	-6	566,460	8,042	568,374	9,956	565,254	6,836
Sacred Heart Catholic Voluntary Academy	192	985,916	180.00	-12	978,907	-7,009	982,533	-3,383	976,622	-9,294
St Joseph's Catholic Primary Academy	195	920,900	194.00	-1	964,841	43,941	968,749	47,849	962,378	41,478
Holy Trinity Primary School, A Church of England Academy	351	1,710,417	372.00	21	1,911,184	200,766	1,918,678	208,260	1,906,461	196,044
Salterlee Primary School	101	501,353	93.00	-8	497,671	-3,682	499,545	-1,808	496,491	-4,862
St John's (CofE) Primary Academy, Clifton	208	933,789	204.00	-4	965,777	31,989	969,887	36,098	963,188	29,399
Lightcliffe C of E Primary School	414	1,829,097	412.00	-2	1,905,771	76,674	1,905,771	76,674	1,905,771	76,674
Park Lane Academy	449	3,499,573	425.00	-24	3,502,314	2,740	3,514,888	15,315	3,494,396	-5,177
Trinity Academy Grammar	931	6,772,976	999.00	68	7,583,857	810,881	7,613,430	840,454	7,565,238	792,262
The Brooksbank School	1419	8,744,925	1,400.00	-19	9,111,466	366,541	9,153,008	408,083	9,085,320	340,395
The North Halifax Grammar School	899	5,163,180	902.00	3	5,440,543	277,363	5,440,543	277,363	5,440,543	277,363
The Crossley Heath School	903	5,182,866	900.00	-3	5,424,361	241,495	5,424,361	241,495	5,424,361	241,495
Rastrick High School	1743	10,437,870	1,787.00	44	11,299,841	861,970	11,352,911	915,040	11,266,443	828,572
Lightcliffe Academy	977	6,245,499	932.00	-45	6,407,280	161,780	6,435,021	189,522	6,389,827	144,328
Brighouse High School	1032	6,288,431	1,042.00	10	6,646,988	358,557	6,677,915	389,484	6,627,523	339,092
Ryburn Valley High School	1383	8,608,235	1,391.00	8	9,108,221	499,985	9,149,521	541,285	9,082,229	473,993
Trinity Academy Halifax	1605	10,648,015	1,616.00	11	11,240,190	592,175	11,288,147	640,131	11,210,007	561,991
The Halifax Academy	1438	9,591,213	1,437.00	-1	9,948,521	357,309	9,948,521	357,309	9,948,521	357,309
Heptonstall Junior Infant and Nursery School	67	396,781	50.00	-17	350,222	-46,559	351,229	-45,552	349,587	-47,194
Luddenden CofE School	100	594,010	93.00	-7	608,218	14,208	610,092	16,081	607,037	13,027
Total	32,653	184,094,131	32,240	-413	191,835,581	7,741,450	192,434,921	8,340,790	191,472,247	7,378,116

Report to Schools Forum

Meeting Date	18 January 2024
Subject	Growth Fund Update
Report Author	Jane Davy

Report purpose

To provide members of Schools Forum with an update report on how the Growth Fund has been spent in 2023/24 and to confirm the amount of DSG (schools block) to be retained for this purpose in 2024-25.

Contact Officers

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1. Background information and context

LA officers presented a report at the October School Forum meeting. The report asked Schools Forum to agree an amount of Schools Block DSG to be retained for 2024/2025.

School Forum agreed in principle to retain £113k of the growth fund allocated to the Schools Block in 2024/25 to fund Growth Fund.

LA officers were asked to bring a report to Schools Forum once the DSG and school data had been confirmed.

Please note that this report has been written assuming the Funding Formula for 2024/25 is applying on the NFF funding factors and values as agreed at the October meeting, any changes are expected to be minimum.

2. Main issues for Schools Forum

Need for consideration.

- a) Schools individual data was announced on the 19 December 2023.

LA officers used this data to calculate the 2023/24 Growth Fund allocation. The report in November estimated expenditure of £479,668 actual expenditure is £466,840 the difference is because the following Schools/Academies did not get the additional pupils expected; The Brooksbank School 15 (estimate 15, actual 12) and Ryburn Valley High 45 (estimate 45 actual 43).

All qualifying schools will receive payment for September 2023 to March 2024 in January 2024, Academies will receive a further payment in the summer term for the period April to Sept 2024.

The total underspend has therefore increased by £12,828 from £23,185 to £36,013.

- b) DSG final allocations were announced on the 19th of December 2023. Calderdale is to receive £421,331 for growth and £140,023 for falling rolls. Revised estimates for 24/25 growth fund is £316,474, the LA will receive a further £109,502 in 24/25 from the ESFA to fund the academies for April to Sept 24, along with the carry forward from 2023/24 of £36,013 plus the £72,886 carried forward from the falling rolls the LA will need to retain £100,000 growth funding for 24/25. The surplus £321k growth and the £140k falling rolls funding can either be used to increase the basic entitlement in the funding formula or towards the 0.5% transfer to the high needs block, School Forum members will determine this when voting on the School Funding Formula agenda Item 7. As previously reported no school is eligible for falling rolls due to not meeting the criteria. A summary of the growth estimated expenditure is shown below. A further report will be brought in autumn 2024 of the expected expenditure for Growth.

3. Recommendations

- a) Schools Forum notes the Growth Fund actual expenditure for 2023/24
- b) Schools Forum agree to retain £100,000 to fund for Growth in 2024/25

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. The schools forum still needs to agree the total 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 is to be met from the 2024/25 growth fund allocation of schools block DSG.

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.

Report to Schools Forum

Meeting Date	18 January 2024
Subject	School Balances
Report Author	Jane Davy

Report purpose
To provide Schools Forum with the latest financial projections for maintained schools for the financial year 2023/24

Need for consideration
Schools Forum to note the current position.

Need for decision
N/A

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

Report to Schools Forum

1. Background information and context

- a) All schools hold revenue balances at the end of each year to allow for unforeseen events and emergencies, and in some cases to smooth out the effects of changes in school rolls, changes to staffing structures and one off expenditure.
- b) This report covers Calderdale's 52 maintained schools (1 through school, 1 secondary, 47 primary and 3 special Schools) and excludes academies.
- c) Schools Forum agreed to suspend the clawback mechanism for the financial year 2023/2024. Therefore, this report is for information only.

2. Main issues for Schools Forum

- a) At the end of the 2022/23 financial year, total school balances in Calderdale (excluding academies) were £10.1 million: primary schools £5.9 million, secondary (inc through school) schools £1.9 million and special schools £2.3 million.
- b) In setting their 2023/24 school budgets, maintained primary schools planned to reduce their balances by the end of the financial year to £4.2 million, maintained secondary schools planned to both have balances of £2.3 million, and special schools planned to have balances of £1.3 million. This would give total planned balances of £7.8 million.
- c) The Autumn term monitor shows maintained primary schools are projecting to have balances at the end of the year of £4.8 million, maintained secondary schools are projecting surplus balances totalling £2.5 million and special schools are projecting £1.7 million. This would give total projected balances of £9 million at the end of March 2024 an increase of £1.2 million from planned budgets.
- d) At the June School Forum meeting it was agreed to suspend the balance control mechanism for 23/24.
- e) Using recommended thresholds of 20% balance of all income, 3 primary schools are projecting balances for 2023/24 above the recommended threshold. 1 of the schools were above recommended thresholds at the end of the 2022/23 financial year.
- f) 3 Primary Schools are forecasting to be in deficit by 31 March 24, a combined total of £78k (1 has since transferred to an academy) and 2 primary schools are projecting balances less than £20k.

g) Overall balances increased during 2022/23 and based on autumn term monitors schools are forecasting an increase in balances during 2023/24 and against planned budgets.

h) A summary of schools balances is shown in Appendix A

3. Recommendations

- The current projections provided by schools are noted.
- A further update is provided in April 2024 based on spring term projections.

4. Reasons for recommendations

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

5. Impact of funding, targets and milestones

No impact unless clawback mechanism is implemented.

6. Resource implications

No Impact unless clawback mechanism is implemented

7. Appendices

Appendix A

Calderdale Schools - Budget Monitoring 2023/24

School Name	Surplus b fwd 2023/24 £	Budgeted Income 2023/24 £	Original Budget 2023/24			Autumn Term Monitoring	
			In-year deficit or surplus £	Original forecast	Year End Balances	Revised forecast £	Year End Balances %
				£	%		
PRIMARY SCHOOLS		Total					
All Saints' CE (VA) J & I School	117,193	1,203,846	-9,118	108,075	8.98%	92,840.87	7.71%
Ash Green Primary School	165,967	3,263,460	-111,903	54,064	1.66%	76,379.00	2.34%
Bailiffe Bridge J & I School	97,019	1,052,563	-28,319	68,700	6.53%	110,212	10.47%
Barkisland CE (VA) Primary School	115,127	1,085,170	-18,381	96,746	8.92%	112,312.59	10.35%
Carr Green J, I & N School	-69,818	1,947,390	2,864	-66,954	-3.44%	-44,386.00	-2.28%
Castle Hill J & I School	79,898	1,154,234	-38,389	41,509	3.60%	40,582.57	3.52%
Central Street Infant & Nursery School	178,792	615,717	-65,041	113,751	18.47%	99,670.36	16.19%
Christ Church (Pellon) CE (VC) Primary School	-33,922	1,476,605	2,357	-31,565	-2.14%	-1,730.54	-0.12%
Christ Church CE (VA) Junior School (Sowerby Bridge)	32,824	899,951	28,667	61,491	6.83%	34,748.00	3.86%
Cliffe Hill Community Primary School	54,310	1,556,405	-47,929	6,381	0.41%	35,177.90	2.26%
Colden J & I School	42,578	654,701	-20,686	21,892	3.34%	7,176.38	1.10%
Copley Primary School	273,830	1,760,962	-4,878	268,952	15.27%	302,764.30	17.19%
Cornholme J, I & N School	103,161	1,127,206	-4,210	98,951	8.78%	27,628.63	2.45%
Cross Lane Primary & Nursery School	54,480	2,179,101	-17,860	36,620	1.68%	37,059.00	1.70%
Elland CE (VA) J, I & N School	282,125	1,359,380	-19,829	262,296	19.30%	292,556	21.52%
Ferney Lee Primary School	157,253	1,452,383	-51,115	106,138	7.31%	60,291.58	4.15%
Hebden Royd CE (VA) Primary School	96,111	656,540	-12,460	83,651	12.74%	87,008.75	13.25%
Heptonstall J, I & N School	24,635	475,256	-53,239	-28,604	-6.02%	-32,388.00	-6.81%

Holywell Green Primary School	90,956	1,116,956	-14,114	76,842	6.88%	77,734.22	6.96%
Ling Bob J, I & N School	225,395	2,409,829	-127,908	97,487	4.05%	145,162.00	6.02%
Longroyde Junior School	19,311	2,356,662	35,113	54,424	2.31%	113,030.22	4.80%
Luddenden CE School	135,334	825,742	-105,613	29,721	3.60%	23,448.63	2.84%
Midgley School	167,235	628,541	-11,288	155,947	24.81%	167,543	26.66%
Moorside Community Primary School	151,734	11,837,709	-31,502	120,232	1.02%	149,098.73	1.26%
New Road Primary School	185,390	1,120,959	-22,455	162,935	14.54%	186,590.26	16.65%
Norland CE (VC) J & I School	118,521	540,372	-19,926	98,595	18.25%	81,395.58	15.06%
Northowram Primary School	141,203	2,396,853	-89,693	51,510	2.15%	56,592.99	2.36%
Old Town Primary School	58,736	622,839	-45,339	13,397	2.15%	23,018.00	3.70%
Parkinson Lane Community Primary School	742,542	3,664,551	-56,850	685,692	18.71%	816,809	22.29%
Ripponden J & I School	162,095	1,196,208	-11,045	151,050	12.63%	142,179.00	11.89%
Riverside Junior School	144,137	1,117,626	-33,163	110,974	9.93%	117,207.00	10.49%
Salterhebble J & I School	41,826	1,272,148	-29,542	12,284	0.97%	41,655.00	3.27%
Savile Park Primary School	413,812	2,952,235	-242,092	171,720	5.82%	131,384.87	4.45%
Shade Primary School	22,556	1,169,109	-915	21,641	1.85%	21,545.31	1.84%
Shelf J & I School	38,494	1,410,867	-20,677	17,817	1.26%	54,609.40	3.87%
St Andrew's CE (VA) Infant School (Brighouse)	45,921	1,133,699	-46,237	-316	-0.03%	24,572.81	2.17%
St Andrew's CE (VA) Junior School (Brighouse)	173,740	1,338,192	-103,414	70,326	5.26%	85,683.99	6.40%
St Mary's CE (VC) J & I School (Sowerby Bridge)	84,539	591,482	980	85,519	14.46%	78,589.95	13.29%
St Michael & All Angels CE Primary School	70,390	1,220,458	-2,550	67,840	5.56%	116,192.53	9.52%
Stubbings Infant School	76,603	385,631	-38,761	37,842	9.81%	55,098.78	14.29%
Todmorden CE (VA) J & I School	297,845	1,524,770	-72,814	225,031	14.76%	239,600.73	15.71%
Triangle CE (VC) Primary School	100,594	1,140,328	-16,558	84,036	7.37%	85,647.98	7.51%
Tuel Lane Infant School	25,720	606,300	-910	24,810	4.09%	6,023.64	0.99%
Walsden St Peter's CE (VC) Primary School	176,615	1,065,164	-57,168	119,447	11.21%	120,652.46	11.33%
Warley Town School	65,300	864,929	-11,810	53,490	6.18%	66,228.36	7.66%
Withinfields Primary School	86,994	2,127,785	-4,863	82,131	3.86%	117,362.75	5.52%
Woodhouse Primary School	102,162	2,205,118	-38,584	63,578	2.88%	124,000.00	5.62%

TOTAL PRIMARY SCHOOLS	5,937,265	74,763,935	-1,689,167	4,248,098	5.68%	4,806,560.70	6.43%
					1		3

School Name		Budgeted Income 2023/24	Original Budget 2023/24			Autumn Term Monitoring	
			In-year deficit or surplus £	Year end balances		Year end balances	
				£	%	£	%
SECONDARY SCHOOLS							
CALDER HIGH SCHOOL	1,253,751	9,168,149	232,762	1,486,513	16.21%	1,657,736.00	17.37%
TODMORDEN HIGH SCHOOL	637,524	6,635,768	143,159	780,683	11.76%	891,835.83	13.36%
TOTAL SECONDARY SCHOOLS	1,891,275	15,803,917	375,921	2,267,196	14.35%	2,549,571.83	15.72%
					0.00%		0

School Name		Income 2023/24	Original Budget 2023/24			Autumn Term Monitoring	
			In-year deficit or surplus £	Year end balances		Year end balances	
				£	%	£	%
SPECIAL SCHOOLS							
HIGHBURY SCHOOL	413,492	3,140,491	-104,625	308,867	9.83%	406,238.00	12.48%
RAVENSCLIFFE HIGH SCHOOL	685,605	6,215,505	-20,270	665,335	10.70%	769,383.00	12.00%
WOODBANK SCHOOL	1,223,431	2,853,739	-880,454	342,977	12.02%	532,672.00	16.89%
TOTAL SPECIAL SCHOOLS	2,322,528	12,209,735	-1,005,349	1,317,179	10.79%	1,708,293.00	13.32%
					0		0

TOTAL ALL SCHOOLS	10,151,068	102,777,587	-2,318,595	7,832,473	7.62%	9,064,425.53	8.82%
					1		3

Report to Schools Forum

Meeting Date	18 January 2024
Subject	De-Delegation of Funding 2023/24
Report Author	Lisa Davies/Jane Davy

Report purpose

For Forum members to vote on whether funds for Union facilities time for maintained Primary and Secondary funds should be de-delegated in 2024/25

Need for consideration

Forum members are required by the EFSA operational Guidance each year to vote whether these funds should be de delegated. Appendix 1 shows a request from the teacher unions to increase the base funding to £3.56 per pupil Primary schools and £4.64 per Pupil Secondary schools.

Need for decision

- a) Appropriate Forum members should vote on whether the funds for union facilities time for maintained primary schools in Calderdale should be de-delegated in 2024/25.
- b) Appropriate Forum members should vote on whether the funds for union facilities time for maintained secondary schools in Calderdale should be de-delegated in 2024/25.
- c) Forum members to vote on whether the union facilities rate be increased per pupil to £3.56 Primary and £4.64 per Secondary pupil for maintained schools in Calderdale to support the work of the unions.

Contact Officers

Jane Davy
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1. Background information and context

a) The EFSA produces school funding operational guidance, and these provide for local authority schools forums to annually take a decision on whether specific funds should be de-delegated and retained by a local authority to provide a joint service on behalf of all maintained schools. This arrangement is not applicable to academies, who make their own arrangements, but academies may choose to buy into any centrally arranged joint service.

b) Last year Calderdale's schools Forum voted to continue to de-delegate funding for union facilities time for both primary and secondary schools (two separate votes). **The indicative funding available in 2024/25 is shown in the table below and totals £41,865. The budget will be amended if there are any further academy conversions in 2023-24. (However, it assumes 2 conversions planned for 1st Jan 24 and 1st April 24 will happen)**

Maintained Schools	Union Facilities Time £
Primary Schools (44)	31,659
Secondary Schools (2)	10,206
TOTAL (50) Schools	41,865

The Local Authority administers the 'de-delegated' budget, the collection of contributions made by academies, approval, and release of funding to unions or authorisation of any claims, and monitoring of costs and usage of individual union allocations. **The Local Authority receives a management fee for this work of £4,000 from these funds.**

2. Main issues for Schools Forum

a) The union facilities time service being provided here is not the provision of "school" based representatives (such representatives are usually provided with reasonable time within school to undertake such work). This service is for the provision of "local" representatives. The service to be provided by the unions is set out in Appendix 1.

b) Academies and special schools make their own arrangements for union facility time. As at April 2023, 21 of Calderdale's academies and 3 Special Schools were buying into the traded service offered by the unions. This will generate income for the union facilities time of £27k in 2023/24 with approx. £31k to be expected in 2024/25.

c) The total de-delegated budget, plus academy income, is then earmarked as an allocation for each union and allocated on either an Invoice or claim provided.

d) The Unions are again requesting that Calderdale maintained schools support the de-delegation of the funding for 2024/25 for the services to be provided in the attached paper.

e) Calderdale's Federation of Teacher Unions have discussed the proposal of increasing the sum available to support the work of the unions through increasing the rate charged per pupil please see attached paper outlining the proposal for school's forum to consider.

f) It will be for primary and secondary maintained school representatives only on Schools Forum to vote on whether funding for union facilities time should be de-delegated in 2024/25 (by a separate vote of primary and secondary). It will be important for voting members to represent the wishes of their constituent groups. In the result of a tied vote the Forum chair has the deciding vote.

g) It has previously been the case that the interested groups of Head Teachers and governors have supported the de-delegation of funding for union facilities time as the view has been expressed that all schools need to work with Unions to reduce the likelihood of costly employment disputes.

3. Recommendations

a) Appropriate Forum members should vote on whether the funds for union facilities time for maintained **primary schools** in Calderdale should be de-delegated in 2024/25

b) Appropriate Forum members should vote on whether the funds for union facilities time for maintained **secondary schools** in Calderdale should be de-delegated in 2024/25.

c) Appropriate Forum members should vote on whether the funds for union facilities time for maintained schools in Calderdale should be **increased to £3.56 for primary schools and £4.64 for secondary schools**.

4. Reasons for recommendations

To comply with the operational guidance issued by the EFSA on school funding.

5. Impact of funding, targets, and milestones

If de-delegation is not approved, schools will have to make their own arrangements to access this resource and be charged on an individual usage basis.

6. Resource implications

The current budget is allocated to schools using pupil numbers in each sector. This provides a funding rate of £3.16 per pupil in the Primary Sector and £4.24 in the Secondary one. There are currently 8,981 pupils in the Primary Sector and 2,132 in the Secondary Sector.

7. Appendices

Appendix 1

De-delegation of union facilities time.

A Joint paper on behalf of the Calderdale teacher Unions

1. Purpose of Document

The purpose of the paper is to provide information as to how the teacher union facilities time has operated since de-delegation was first approved in October 2012 in order that Schools Forum can review that system.

Throughout the document the 'statistics' refer solely to the duties carried out by the following unions NEU, NASUWT and NAHT.

2. What does the law require?

There are several pieces of legislation which apply to the provision of facilities to discharge trade union duties. These include the Trade Union and Labour Relations (Consolidation) Act 1992, the Health and Safety at Work etc Act 1974 and the Safety Representatives and Safety Committees Regulations 1997.

In Calderdale the decision to de-delegate funding in primary and secondary maintained schools, the decisions by a number of Academies to 'buy-in' and decisions by a majority of the Special Schools to 'buy-in' enables funding to be made available so that facilities can be provided as per the legislation, in those schools which are 'part of the system'.

These facilities are potentially provided **to all the teacher trade unions in Calderdale and are currently claimed**, in proportion to declared membership, by (order of size).

3. Schools that do not contribute

However, the local (Calderdale-level) branches of the teacher trade unions are unable to provide legal representation, advice, and support within school hours to their members in schools that do not 'buy-in'.

4. Trade union duties

The trade union duties that might be undertaken on behalf of members include:

- disciplinary hearings,
- grievance hearings,
- informal capability meetings,
- formal capability meetings,
- sickness absence monitoring meetings,
- terms and conditions of employment,
- consultation meetings on changes to working arrangements,
- investigations,
- termination of employment,
- suspension of employment,
- the duties of employment of a member,
- the duties of employment of a group of members,
- advising and representation with regard to flexible working

- negotiation and consultation, and other procedures, relating to the above matters, including the recognition by employers of the right of a trade union to represent members in such negotiation or consultation or in the carrying out of such procedures,
- consultation relating to TUPE,
- negotiations under TUPE,
- Section 188 redundancy notices,
- investigate member's complaints regarding health, safety, or welfare at work,
- carry out health and safety functions such as investigating potential hazards,
- making representations to the employer on the above,
- representing members in workplace consultations on Health & Safety,
- attending safety committee meetings
- representing members at meetings,
- providing information and guidance to school reps,
- (union learning reps) carrying out 'relevant learning activities',
- facilitating compromise (settlement) agreements.

During the past year the unions carried out on one, or more than one, occasion all the duties listed above. In addition, all the local union representatives with time funded by facility time undertook training during the year.

In addition to the above the teacher trade unions have been involved in extensive consultations during the last year with both HR in the LA and other providers on a number of policies and advice. This enables HR providers to be able to offer schools policies which have already been consulted upon with the teacher trade unions. This has the clear advantage that should a school adopt such policies it can do so in the knowledge that it is not going to be 'in dispute' with the trade unions.

5. Scope of Support and Advice

During the past year the teaching unions have provided advice to, supported, and represented members in many maintained schools as well as many academies and special schools that 'buy into' the system.

It is worth noting that schools may well be unaware that union members in their school have sought advice from their union as frequently advice consists of telephone calls, emails, or meetings off the school premises. Union advice given in such a way, where it clarifies a member's rights, entitlements or duties, or resolves a potential dispute without recourse to any school procedure can prevent any unnecessary conflict/dispute in school.

This preventative work constitutes a considerable amount of the casework undertaken by local officers, this being higher in schools without a school representative.

6. The request for continued de-delegation of the facilities budget.

The request from the teacher trade unions is to continue for the year 2023-24 the de-delegation of the trade union facilities budget, as the system of teacher trade union

facilities currently operating in Calderdale demonstrably continues to work effectively and efficiently.

In a national context the government recognises that there are significant benefits to both employers and employees when organisations and unions work together effectively to deliver high quality public service. This requires public sector organisations who employ over 49 Full Time Equivalent Staff to publish information relating to trade union usage/spend.

If there is a decision made by the schools Forum not to continue to de-delegate the funding for the Teacher Trade Union Facilities budget this would consequently lead to the collapse of the local Calderdale facilities arrangements as the cost of releasing existing Local Trade Union Officers would be then borne by the small number of schools in which the current representatives are employed – a position unions feel would be completely untenable.

Duties currently undertaken by the trained, experienced Local Officers of the recognised unions would then have to be undertaken at a school level by school-based representatives.

This would mean that every school would have to:

- fund the costs of having a fully trained and accredited representative for every union.
- school representatives would need to be trained to a much higher level of expertise than is currently necessary.
- initially each representative would be required to undertake a three-day training course for which they would be entitled to time-off with pay.
- further training would then be required on an annual basis.
- plus, each union would be entitled to appoint a health and safety representative and a union learning representative, both of whom would be entitled to paid time-off to undertake the necessary training.

Following the training each representative would then be entitled to reasonable time-off, with pay, to carry out their duties.

Consequently, all of the above would

- place a considerable financial burden on every school.
- be much more disruptive to the smooth running of schools and to the learning of the pupils, as each time a union representative was required to represent a member in school, carry out a health and safety inspection or carry out their ULR role, this would require the representative to be released from their teaching duties.
- fewer issues would be resolved informally, resulting in a significant increase in costs to schools and workload for school leaders, governors, and LA officers. Disciplinary, grievance and capability issues would be more likely to escalate, with cases much more likely to reach employment tribunals.

The current system of Calderdale-wide representatives on paid facility time means that such disruption, to the teaching and learning, is minimised and is clearly also much more cost-effective.

The current arrangements efficiently pool the cost risk to individual schools as well as allowing trade unions to provide more effective support through trained and experienced representatives.

Please note - Union subscriptions are used to provide support to all members of the trade unions at a national and regional level as well as providing legal support where this is necessary. Union subscriptions are not used to provide facility time which is an entitlement under legislation to be provided by the employer.

7. The request for the consideration of an increase in the amount of facility time funding

There continues to be concerns from elected local union officers who undertake trade union duties funded by the de-delegated facilities budget, regarding the amount of the budget providing insufficient funds to enable local officers to undertake the duties and legal representation required by schools.

This appears to be due to the following factors:

The amount of casework needing union officer time is increasing. While changes to legislation and statutory guidance to employers prompts some of this increase, the largest part is due to the current school funding situation.

Recent increase in teachers' pay have not been fully funded by the government, and the number of schools and academies paying into the pot have decreased.

This means that in terms of time, which is the key factor in trade union representative release, capacity within the facility pool is shrinking.

The current situation

The rate of £3.16 per primary and £4.24 per secondary pupil was agreed by school's forum in 2022 for the academic year 2023-24.

Neighbouring local authorities charge significantly more per pupil for facilities time.

Although not the lowest rate in the country, £3.16/£4.24 per pupil is significantly lower than most other local authorities, including those nearest to us. As an example, Bradford's per pupil cost is £5.00, Kirklees is £6.01, and in Leeds it is £5.63 plus £3.08 extra per pupil premium pupil.

Conclusion

The teaching profession continues to be one of the most unionised professions in the country and consequently the recognised teaching unions in Calderdale are able to represent over 99% of the teachers in Calderdale.

The current system of effective representation by trained and experienced local representatives has been demonstrated to be an effective and efficient process and should continue to the benefit of all concerned.

A decision not to de-delegate for a further year would inevitably lead to an increase of costs to the majority of schools and, potentially, to all schools as well as a considerable worsening in 'industrial relations' to the detriment of all concerned.

With regard to the content of this report the Calderdale teaching unions –

Are requesting to continue to provide a local level of union representation and that the cost per pupil be increased to £3.56 per pupil (Primary) and £4.64 per pupil (Secondary) for the year 2024-25.

Compiled by the union officers of the Calderdale Federation of Teaching Unions

Report to Schools Forum

Meeting Date	18 January 2024
Subject	High Needs Recovery Plan for DfE 2023 -2024
Report Author	Paul Tinsley – Interim Assistant Director Education and Inclusion David Graham – Interim SEND and Inclusion Service Manager Victoria Coyle- Interim Head of Inclusion & SEND

Report purpose

To manage the increasing deficit within the Dedicated Schools Grant (DSG), we have developed a High Needs Block Recovery Plan which will seek to stabilise the increasing overspend alongside improving outcomes for children and young people and creating a sustainable system within Calderdale to meet the needs of children and young people with SEND.

Need for decision

To establish a DSG Deficit Management Plan Reference Group and have updated reports as a standing item for Schools Forum.

Contact Officers

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Victoria Coyle- Interim Head of SEND & Inclusion Victoria.coyle@calderdale.gov.uk

a) Background information and context

- 1 High needs budgets in English local authorities (LAs) have come under increasing pressure in recent years with a significant proportion of authorities finding it difficult to deliver their local need within the budgets allocated to them.
- 2 Calderdale has been one of the few LA's who have met the needs of their pupils with SEND within their DSG High Needs Block. However, due to unprecedented pressure this position has significantly changed within the current financial year.
- 3 The DfE acknowledges the pressures which local systems are experiencing delivering special educational needs and disability (SEND) services and officers have been working with the DfE as a partner within the national Change Programme.
- 4 [The SEND Change Programme](#) is a national program in England that aims to test some of the changes the government wants to make to the system for supporting children and young people with special educational needs and disabilities (SEND) . The program is being delivered by "Change Programme Partnerships" in each of the nine regions of England, each led by at least one named local authority . The program is expected to run over the next 2 to 3 years with selected local authorities in 9 regions, working alongside families to implement, test and refine longer-term plans . The program includes investment in training for thousands of workers so children can get the help they need earlier, alongside thousands of additional specialist school places for those with the greatest needs . The transformation of the system will be underpinned by new national SEND and AP standards, which will give families confidence in what support they should receive and who will provide and pay for it, regardless of where they live . The program aims to provide better, fairer access to high-quality special educational needs and disabilities support .
- 5 Calderdale Schools Forum will be a key partner in developing the DSG Deficit Management Plan which is a DfE requirement for LAs in deficit.
- 6 Please see attached report to access a copy of the unmitigated DSG Deficit Management Plan.
- 7 The attached PowerPoint presentation will be presented to schools forum at the meeting.

Reference Documents

- 1 [High needs funding: 2023 to 2024 operational guide - GOV.UK \(www.gov.uk\)](#)
- 2 [Dedicated schools grant \(DSG\) deficit management plan - GOV.UK \(www.gov.uk\)](#)

Report to Schools Forum

Meeting Date	18 January 2024
Subject	Calderdale CSSB-funded statutory services for schools / Allocation of 2024/25 Central School Services Block (CSSB)
Report Author	Steve Drake

Report purpose
<ul style="list-style-type: none"> To provide an update on the Calderdale CSSB-funded statutory services for all schools To seek approval of the members of Schools Forum on the proposed use of the 2024/25 Central Services Block funding

Need for consideration
Schools Forum is asked to note the continuing reduced CSSB funding envelope in 2024/25.

Need for decision
Schools Forum is asked to approve the recommended allocation of the 2024/25 Central School Services Budget (CSSB) as set out in the report.

Contact Officers
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1. Background information and context

- a) In April 2018 the DfE created the central school services block (CSSB) through which LAs are allocated funding for the statutory responsibilities they hold for all schools.
- b) The CSSB brings together:
 - funding previously allocated through the retained duties element of the ESG
 - funding for ongoing central functions, such as admissions, previously top-sliced from the schools block and now determined by the National Funding Formula using a pupil-led formula.
 - residual funding for historic commitments, such as School Improvement Cluster funding, previously top-sliced from the schools block
- c) Schools Forum is reminded that the DfE is reducing the historical commitments element of funding over time regardless of whether local authorities have ended these arrangements.

The DfE has confirmed that funding for 2024/25 will reduce by a further £141K. This is a 20% reduction on 2023/24 levels of funding.

- d) LAs are required to advise their School Forums on the proposed use of CSSB funding and an operational guide has been published setting out restrictions on how the funding can be spent.
- e) The following central services are allocated funding from the CSSB to meet the LA's statutory duties for all schools:

Education Welfare

Exclusions

HR Pensions

LFM Finance

SACRE

School Organisation and Planning

Strategic Planning for Education

2. Main issues for Schools Forum

- a) The CSSB funding for 2023/24 will be **£1.81m** based on the following:

Funding for historical element	£0.564m
Funding for ongoing responsibilities under the NFF	£1.246m

The historical element has been reduced by 20% (£141K) compared to 2023/24.

The per-pupil rate for ongoing responsibilities has been confirmed as £38.65 for 2024/25. This is a 3.67% increase on the 2023/24 per-pupil rate of funding. The funding is based on pupil data as at Oct 2023 (ie 32,238).

- b) The LA's business planning process identifies the statutory, discretionary and traded elements of each service together with their full-cost so funding can be properly appropriated. To ensure the LA's statutory duties are not subsidised from other funding sources, the costs of support services are attributed in the business planning process. We are therefore confident the services are achieving full-cost recovery.
- c) The services, and their estimated costs of meeting statutory duties for all schools, in 2024/25, are listed in Appendix 1.
- d) Appendix 3 outlines the proposed use of the Central School Services Block (CSSB) for 2024/25 and the total funding required to fund the services to schools is **£1.26m**.
- e) The first call on the funding has to be for School Licences to cover the cost for copying of materials, performing, recording and broadcasting of music and films in schools. It has been forecast this will be £221K in 2024/25. The 2023/24 allocation has been inflated as the actual costs have not been finalised yet. This is Government mandated.
- f) Funding of £274K has been allocated to School Improvement Cluster Funding in 2024/25. This has had to be reduced following the reduction in historic funding.
- g) The CSSB funding available in 2024/25 will be **£1.81m** therefore there is an unallocated £54K that will be available to use with the central block services

3. Recommendations

- a) Schools Forum is asked to approve the recommended allocation of the 2024/25 Central Schools Services Block (CSSB) as set out in the report.
- b) Schools Forum are asked to agree the use of the £54K surplus for Education Welfare Services new duties or to apportion this money elsewhere within the CSSB
- c) Through its business planning processes the LA will continue to scrutinise and actively challenge its operating models to ensure effective and efficient delivery of its services to reflect statutory requirements.

4. Reasons for recommendations

Contained in this report

5. Impact of funding, targets and milestones

Contained in this report

6. Resource implications

Contained in this report

7. Appendices

Appendix 1: Summary of Calderdale Council's CSSB-funded statutory services for all schools

Appendix 2: Extract from Guidance

Appendix 3: Proposed Allocation of Central School Services Block 2024/25

Appendix 1

Summary of Calderdale Council's CSSB-funded statutory services for all schools

1. Education Welfare Service (EWS)

2024/25 cost of meeting EWS duties (current model): £ 278,558

2024/25 cost of meeting EWS duties (proposed model): £ 332,191

2023/24 cost of meeting Exclusions duties: £ 60,000

The revised changes outlined in the Working Together to Improve School Attendance responsibilities places a range of additional responsibilities on the LA which requires a significant increase in service capacity.

The service is required to undertake termly targeting support meetings with all schools including the independent sector in addition to their current responsibilities. Where attendance is below local or national data, the service is required to provide additional support meetings on a half termly basis. The current service structure identified to meet these additional responsibilities requires the following:

- Team Manager
- EHE Lead Officer
- EHE Officer
- EWO x 4
- 1.6 FTE Business Support

The service currently are in the process of recruiting to 2 vacant Education Welfare Officer (EWO) posts and have been unsuccessful in 2 attempts recently. These posts are required to deliver the new statutory DfE requirements and in due course and potentially provide additional support to schools above that required through the guidance.

We are aware that neighbouring authority's grade EWO posts at SO1 level and believe this is a contributory factor in our unsuccessful recruitment attempts. Each Officer has some delegated responsibility for one of our statutory areas such as Elective Home Education, Children Missing Education and Child Employment and Entertainment and are required to prepare and present prosecution cases in the magistrates Court.

All EWO's will be required to provide advice and guidance to a cluster of schools and provide direction and training to ensure compliance with the requirements of the Working Together to Improve School Attendance legislative framework. As such they will be guiding and directing school attendance officers many of whom are often on Scale 5/6 or even SO1 grade and will be meeting with Headteachers at the schools

they represent to ensure further compliance with the requirements in terms of school's responsibilities in securing improved attendance.

For 23/24, the service received £278,558 DSG funding. The table below provides the funding required to establish the above the structure and deliver the wide-ranging responsibilities in supporting schools to raise attendance.

6001 Education Welfare 24/25		
		AMT £
Cost in Year due to Regrade for EWO Officers		6,194
Cost of Increase in FTE EWO Officers		42,420
Cost of potential Pay award @4.5%		15,392
Total increase in year to cost centre		64,007
Funded by		
Increase in Schools Block DSG		53,633
Increase to FPN		8,469
Increase to base		1,905
		64,007
23/24 Schools Block DSG	278,558	
24/25 Schools Block DSG required	332,191	
Increase in Schools Block DSG	53,633	

Option 1 – DSG to fully fund £332,191 for 24/25. This will enable the service to fully implement and deliver the guidance, provide additional support to schools and fulfil all other statutory duties.

Option 2 – DSG funding to remain the same as 23/24 (£278,558) will lead to a significant decrease in the amount of statutory legal interventions undertaken for schools.

2. HR Pensions

2024/25 cost of centrally controlled teachers' pensions £ 148,000

Additional pension funding that LAs have claimed for centrally employed teachers has now been rolled into the ongoing responsibilities element of the CSSB.

3. LFM Service

2024/25 cost of meeting LFM duties: £ 50,000

Statutory duties

The Local Authority has the following statutory duties under the Schools and Early Years Finance Regulations 2018, School Standards and Framework Act 1988, Education Act 2002:

Responsibilities for all schools

- Revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Sch 2, 22)
- Authorisation and monitoring of expenditure not met from schools' budget shares (Sch 2, 15c)
- Calculation and audit of individual school budget shares to all schools
- Payment of High Needs top up to all schools

Customer need

- Sound financial advice and planning
- Financial skills and school/academy experience
- Choice
- Value for Money
- High quality, customer focused service meeting individual customer needs
- Consistency and stability
- Personable/relationships
- Someone to listen to enquiries, feedback, complaints and act promptly

Changes to delivery:

For all schools the Service calculates ISB and pays high needs top up. For maintained schools the Service currently pays all other ESFA grants. There is no alternative to the LA carrying out these duties. However, during the Covid-19 pandemic, the service was delivered remotely and no face-to-face support or school visits were undertaken. It is envisaged this will continue in the future for the majority, apart from a small number, of cases. The saving in reduced travel costs is being used to part-fund a trainee Finance Officer as a resilience measure as the service has several staff nearing retirement age.

Outcomes

- The LA has discharged its statutory LMS duties and schools have been paid
- All academies receive a statement from the ESFA in March based on the information provided from the LA detailing their ISBS for the year starting 1 Sept
- Financial guidelines are prepared to ensure schools meet their statutory duty when spending public money
- Reports prepared to assist Schools Forum to carry out their statutory duties in accordance with school regulations
- School expenditure monitored against budget to ensure schools do not fall into deficit and advice and early intervention is provided to minimise cost to the school and LA
- Timely payment of High Needs top ups to all schools ensures schools have funding for resources to help pupils with additional educational needs
- Liaising with external audit on schools' behalf to minimise external interventions.

4. SACRE

2024/25 cost of meeting SACRE duties: £ 23,140

Statutory duty for all schools:

Standing Advisory Council for Religious Education (SACRE) (Sch 2, 17)

SACRE is commissioned to an external provider with the LA providing clerking and administrative support.

5. School Organisation and Access

2024/25 cost of meeting Admissions duties: £ 451,560

2024/25 cost of Capital advice and projects: £ 92,800

2023/24 cost of Schools Forum Support: £ 5,000

Schools Capital

Management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Sch 2, 14a)

The Service plays a key role developing schools capital spending plans: for maintenance funding (as part of an approval process – panel led); basic need (sufficiency of provision) to identify and agree where spend is invested and act as ‘client’ in the commissioning of such additional provision. The Local Plan is now in place which has generated an increased workload to be followed by project delivery.

Sufficiency and Planning

- Obtain birth data, GP registrations and Town Planning data to map to school planning areas to project demand for future school places and work with officers on the Local Plan to ensure educational requirements are represented in proposals.

School Organisation

- Identify and develop school organisational proposals and manage through statutory and decision-making processes and implementation
- Annual SCAP Return advises DFE on pupil capacity against projected need for places and influences funding to create additional places

Co-ordination of admissions

- Primary, Secondary, Published Admission Numbers and Oversubscription Criteria (for all Community and VC Schools)
- Challenge unfair arrangements or breaches of code through the Schools Adjudicator
- Collate admission arrangements and publish prospectus
- Admissions Forum (no longer statutory): a consultative group providing admissions advice and guidance to LA officers
- Advice and guidance to schools and parents on admission processes
- Attend school open evenings
- Manage application process for all places including the co-ordination of cross border requests. Manage the application process for reallocation requests for all schools
- Manage coordinated round of reallocations to published criteria
- DFE statistical returns and Annual Report to the Office of the Schools Adjudicator

In Year Applications: allocation of places (part statutory)

- Receive, vet and prepare applications for BACS
- Manage in-year transfer requests through attending and/or chairing BACS
- Implement In-Year Fair Access protocols for hard to place pupils (Statutory).
- Directed Pupils (Statutory)

Appeals

- Prepare and present defence for schools at Independent Appeal / Arbitration

Schools Forum

- Support and coordinate the work of the Schools Forum (Sch 2, 12)

PFI Contracts

- Co-ordinate, chair and minute meetings of PFI Operational Group
- Represent the LA's interest as 'named officer'
- AVR input and approvals
- Dispute resolution and relationship management
- Manage permissions for proposed works or alterations.
- Coordinate payment mechanisms

Alternative approach: Although some elements of in-year process exceed the required statutory minimum, they enhance the LA's ability to discharge those duties.

Most work is carried out in a prescribed manner to a set timetable so the scope for changing or developing the service is to a degree constrained by the legal and regulatory framework.

6. Strategic planning

2024/25 cost of meeting Strategic planning duties: £ 152,100

Statutory duties

The LA's Strategic duties in planning for Calderdale's education service are defined under Children Act 2004 Section 18, Education Act 2005 Sections 11B and 11A, Section 15 (amended by Education Act 2011 section 40), Education and Inspections Act 2006 Sections 60A and 69B. They include:

For all schools:

- Director of Children's Services and personal staff for Director (Sch 2, 15a)
- Planning for the education service as a whole (Sch 2, 15b)
- Consultation costs relating to non-staffing issues (Sch 2, 19)
- Plans involving collaboration with LA services or public/voluntary bodies (Sch 2, 15f)
- Provision of information to or at the request of the Crown other than relating specifically to maintained schools (Sch 2, 21)

Appendix 2

Extract from Guidance

50. Annex 3 – central services that may be funded with agreement of schools forum

The split of services between responsibilities that local authorities hold for all schools, and those that relate to maintained schools only are shown below.

Responsibilities held by local authorities for all schools are funded from the central school services block, with the agreement of schools forums.

Responsibilities held by local authorities for maintained schools only are funded from maintained schools budgets only, with agreement of the maintained schools members of schools forum.

The department has included references to the relevant schedules in the [School and Early Years Finance \(England\) Regulations 2022](#).

51. Responsibilities held for all schools

Statutory and regulatory duties

- Director of children's services and personal staff for director (Schedule 2, 15a)
- planning for the education service as a whole (Schedule 2, 15b)
- revenue budget preparation, preparation of information on income and expenditure relating to education, and external audit relating to education (Schedule 2, 22)
- authorisation and monitoring of expenditure not met from schools' budget shares (Schedule 2, 15c)
- formulation and review of local authority schools funding formula (Schedule 2, 15d)
- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of LGA 1972 except duties specifically related to maintained schools (Schedule 2, 15e)
- consultation costs relating to non-staffing issues (Schedule 2, 19)
- plans involving collaboration with other local authority services or public or voluntary bodies (Schedule 2, 15f)
- standing Advisory Committees for Religious Education (SACREs) (Schedule 2, 17)
- provision of information to or at the request of the Crown other than relating specifically to maintained schools (Schedule 2, 21)

51.1 Education welfare

- functions in relation to the exclusion of pupils from schools, excluding any provision of education to excluded pupils (Schedule 2, 20)

- school attendance (Schedule 2, 16)
- responsibilities regarding the employment of children (Schedule 2, 18)

51.2 Asset management

- management of the LA's capital programme including preparation and review of an asset management plan, and negotiation and management of private finance transactions (Schedule 2, 14a)
- general landlord duties for all buildings owned by the local authority, including those leased to academies (Schedule 2, 14b)

51.3 Other ongoing duties

- licences negotiated centrally by the Secretary of State for all publicly funded schools (Schedule 2, 8); this does not require schools forum approval
- admissions (Schedule 2, 9)
- places in independent schools for non-SEN pupils (Schedule 2, 10)
- remission of boarding fees at maintained schools and academies (Schedule 2, 11)
- servicing of schools forums (Schedule 2, 12)
- back-pay for equal pay claims (Schedule 2, 13)
- writing to parents of year 9 pupils about schools with an atypical age of admission, such as UTCs and studio schools, within a reasonable travelling distance (Schedule 2, 23)

51.4 Historic commitments

- capital expenditure funded from revenue (Schedule 2, 1)
- prudential borrowing costs (Schedule 2, 2(a))
- termination of employment costs (Schedule 2, 2(b))
- contribution to combined budgets (Schedule 2, 2(c))

52. Responsibilities held for maintained schools only

52.1 School improvement

- expenditure related to core school improvement activities of local authorities with respect to maintained schools (Schedule 2, 54)

52.2 Statutory and regulatory duties

- functions of local authority related to best value and provision of advice to governing bodies in procuring goods and services (Schedule 2, 59)
- budgeting and accounting functions relating to maintained schools (Schedule 2, 75)
- authorisation and monitoring of expenditure in respect of schools which do not have delegated budgets, and related financial administration (Schedule 2, 60) Monitoring of compliance with requirements in relation to the scheme for financing schools and the provision of community facilities by governing bodies (Schedule 2, 61)

- internal audit and other tasks related to the local authority's chief finance officer's responsibilities under Section 151 of LGA 1972 for maintained schools (Schedule 2, 62)
- functions made under Section 44 of the 2002 Act (Consistent Financial Reporting) (Schedule 2, 63)
- investigations of employees or potential employees, with or without remuneration to work at or for schools under the direct management of the headteacher or governing body (Schedule 2, 64)
- functions related to local government pensions and administration of teachers' pensions in relation to staff working at maintained schools under the direct management of the headteacher or governing body (Schedule 2, 65)
- retrospective membership of pension schemes where it would not be appropriate to expect a school to meet the cost (Schedule 2, 78)
- HR duties, including advice to schools on the management of staff, pay alterations, conditions of service and composition or organisation of staff (Schedule 2, 67), determination of conditions of service for non-teaching staff (Schedule 2, 67); appointment or dismissal of employee functions (Schedule 2, 68)
- consultation costs relating to staffing (Schedule 2, 69)
- compliance with duties under Health and Safety at Work Act (Schedule 2, 70)
- provision of information to or at the request of the Crown relating to schools (Schedule 2, 71)
- school companies (Schedule 2, 72)
- functions under the Equality Act 2010 (Schedule 2, 73)
- establish and maintaining computer systems, including data storage (Schedule 2, 74)
- appointment of governors and payment of governor expenses (Schedule 2, 75)

52.3 Education welfare

- inspection of attendance registers (Schedule 2, 81)

52.4 Asset management

- general landlord duties for all maintained schools (Schedule 2, 79a & b (section 542(2)) Education Act 1996; School Premises Regulations 2012) to ensure that school buildings have:
- appropriate facilities for pupils and staff (including medical and accommodation)
- the ability to sustain appropriate loads
- reasonable weather resistance
- safe escape routes
- appropriate acoustic levels
- lighting, heating, and ventilation which meets the required standards
- adequate water supplies and drainage
- playing fields of the appropriate standards

- general health and safety duty as an employer for employees and others who may be affected (Health and Safety at Work etc. Act 1974)
- management of the risk from asbestos in community school buildings
- (Control of Asbestos Regulations 2012)

52.5 Central support services

- clothing grants (Schedule 2, 55)
- provision of tuition in music, or on other music-related activities (Schedule 2, 56)
- visual, creative, and performing arts (Schedule 2, 57)
- outdoor education centres (but not centres mainly for the provision of organised games, swimming, or athletics) (Schedule 2, 58)

52.6 Premature retirement and redundancy

- dismissal or premature retirement when costs cannot be charged to maintained schools (Schedule 2, 80)

52.7 Monitoring national curriculum assessment

- monitoring of National Curriculum assessments (Schedule 2, 77)

52.8 Therapies

- this is now covered in the high needs section of the regulations and does not require schools forum approval

52.9 Additional note on central services

Services set out above will also include administrative costs and overheads relating to these services (regulation 1(4)) for:

- expenditure related to functions imposed by or under chapter 4 of part 2 of the 1998 Act (financing of maintained schools), the administration of grants to the local authority (including preparation of applications) and, where it's the local authority's duty to do so, ensuring payments are made in respect of taxation, national insurance, and superannuation contributions
- expenditure on recruitment, training, continuing professional development, performance management and personnel management of staff who are funded by expenditure not met from schools' budget shares and who are paid for services
- expenditure in relation to the investigation and resolution of complaints
expenditure on legal services

Appendix 3

Proposed Allocation of Central School Services Block 2024/25

Service Area	2024/25 Funding Allocation £000's	
Government Mandated		221
School Licences	221	
Retained Duties		274
School Improvement Cluster Funding	274	
Statutory/Regulatory Services to Schools		1,261
Including:		
Education Welfare	278,560	
Permanent Exclusions	60,000	
Centrally Controlled Teachers' Pensions	148,000	
Finance Support/ LFM	50,000	
SACRE	23,140	
Capital Advice & Projects	92,800	
Strategic Planning of School Places/ School Admissions/ School Organisation/ Schools Forum Support	451,560	
Strategic Planning	152,100	
CSSB Funding required		1,756
CSSB Funding available		1,810
Balance to allocate		54

Report to Schools Forum

Meeting Date	18 January 2024
Subject	Update on School Rebuilding Programme
Report Author	Richard Morse

Report purpose
To update Forum Members on Progress with the School Rebuilding Programme

Need for consideration
For information

Need for decision
No Decision Required

Contact Officers
Richard Morse 07540 671288

Background information and context

- a)** The school rebuilding programme (SRP) is a national programme targeting the worst condition schools in England for major rebuilding and refurbishment projects. Priority is afforded to schools based upon their condition.
- b)** In early rounds of the programme, schools were selected centrally based on condition need identified by the DFE's Condition Data Collection (CDC) exercise. This resulted in Castle Hill Primary School being included within the programme as announced in July 2021.
 - the first set of 50 schools, announced in February 2021
 - the second set of 50 schools, announced in July 2021
 - the third set of 61 schools, announced in July 2022
 - the fourth set of 239 schools, announced in December 2022
- c)** In early 2022 responsible bodies were given the opportunity to submit their bids for the next phase of programme and advised of the criteria against which bids would be assessed.
- d)** Officers from CYP and Major Projects pulled together data that included the DFE's CDC results, our own commissioned AMP (asset management plans), structural engineer reports and anything in our possession that would support our bids.
- e)** A total of 15 bids were then submitted by Calderdale officers, in addition a further 5 bids were submitted independently by some of our academies and voluntary aided schools located throughout the borough.
- f)** As part of the analysis of our bids we were contacted by advisers from the Department of Education and arranged numerous site visits for structural engineers, flood advisers and other technical advisers to review our submissions and secure additional detail and evidence.

- g)** In December 2022, following assessment of our submission and supporting data, the outcome of our bids was published. Of our Local Authority bids 9 had been successful and a further 2 independent bids had been accepted. This will see an unprecedented investment within Calderdale's School estate estimated to be worth in excess of £100m.
- h)** The list of successful bids that will now follow Castle Hill Primary later in the rebuilding programme:
Central Street Infant and Nursery School, Cross Lane Primary and Nursery School, Riverside Junior School, Shade Primary School, Stubbings Infant School, The Brooksbank School, The Calder Learning Trust, Todmorden CofE J, I & N School, Todmorden High School, Walsden St Peter's CE (VC) Primary School, Woodhouse Primary School.
- i)** Officers have been working hard with the Department's project delivery team on the Castle Hill project.
- j)** So far there have been 8 half-day client engagement meetings (CEMS) involving CYPS officers, lead DFE SRP representatives, DFE technical consultants/advisors, the successful tender – Galliford Try, architects, mechanical and electrical engineers and consultants, catering design consultants, structural engineers, highways advisors, home to school transport advisors, biodiversity net gain consultants, planning consultants and heritage advisors. Numerous associated smaller targeted group meetings have also taken place.
- k)** It is anticipated, designs and proposals will be sufficient developed for submission for planning (and associated consultation period) in the Spring and that in a little over two years Castle Hill pupils will be able to occupy their new school surroundings.

- l)** In parallel, work has gone into preparing for the next steps with our successful school bids as we want to be able to seize upon this opportunity to address a range of issues such as sufficiency of capacity, sustainability and enhanced special needs provision. Additional benefits will see substantial progress towards the Authority's aspirations around the climate emergency as schools that are rebuilt as part of the programme will be net carbon zero in operation and will in addition bring bio net diversity gains.
- m)** Officers have commenced with a number of site familiarisation visits for the School Rebuilding Programme Director and project leads. This will inform the prioritisation process of school sequencing and should ensure our worst condition issues are addressed sooner in the programme rather than later. It is important that the Department are kept fully apprised of any building related developments connected to schools within the programme, of which there have been a number.
- n)** We have already had to attend to priority works at Castle Hill, Woodhouse (roof replacement @ £600k) and roofing/structural issues at Shade Primary. We must keep schools in a safe and operational condition whilst waiting for the programme to address matters longer term. Whilst it is frustrating that such sums need to be spent ahead of a programme that would otherwise address these issues, Health and Safety remains a priority and cannot be compromised.
- o)** These site visits also provide opportunity for introductions to the school leadership and site management teams and advice and discussion on what to expect from the programme once a school commences their journey.
- p)** Discussions have taken place regarding the strategy and facilitating steps required, to progress the programme further, including making the most of opportunities to address some of the shortfalls in our current provision.

- q) Numerous high-level scenarios are being explored so that relatively early decisions can be taken over what realistically can be achieved and should be taken further for more detailed development.
- r) Some scenarios may well result in formal proposals being brought forward around consolidation of provision or expansion of specialist provision. It is currently well known that surplus capacity exists in parts of the borough and there is opportunity therefore to remove surplus capacity and repurpose this for where there are shortages.
- s) There is a 'cart and horse' aspect to some of this. In order to develop certain aspects of strategy and develop firm proposals for consultation, it is necessary to know what might be physically deliverable through SRP. For example, there would be no point in an amalgamation exercise if it were not physically possible to consolidate multiple provisions onto fewer sites due to either financial limitations, stakeholder objections or the physical constraints of certain sites.

Main issues for Schools Forum

- a) Whilst SRP is a Central Government programme of procurement, there is a clear vested interest for Calderdale CMBC as a stake holder to ensure that the outcome of the programme addresses all of the condition issues that it is intended to address.
- b) There are many considerations for us as an Authority that we would wish to see reflected in the delivery of the programme – issues around sufficiency of provision (Identify and provide options around the addition or removal of capacity), suitability of site and the potential need to secure new sites of places, repurposing mainstream capacity for special needs provision etc.

- c) Net Zero Carbon and energy efficiency are shared aspirations with the DFE and Council and will present substantial cost saving to schools in running costs.
- d) The role of CYP officers is to ensure these issues are factored into the programme, to facilitate progress with all of the associated Council Functions – Planners, Building Control, Biodiversity, Heritage, Highways, avoiding any conflicts or delays that would jeopardise progress or a school's continued inclusion within the programme.
- e) It will also be for officers to lead on any associated statutory processes relating to 'School Organisation' (for example if there were any consolidation of provision from multiple sites onto one).
- f) There is finally a role for officers to keep the Department for Education fully apprised of ongoing building condition issues particularly where matters are deteriorating. This will ensure that schools within the programme are appropriately prioritised and those in greatest need go earlier in the programme and are potentially moved forward from their original proposed slot. It also means that once rebuilt the ongoing cost to the Authority (and schools themselves) of running and maintaining these poor condition buildings is reduced, releasing spend for those schools less fortunate that are not included within the programme.
- g) The role for the Forum is to continue to ensure that sufficient resource is allocated to ensure that the maximum benefit can be secured for our schools and pupils.

Recommendations

No change recommended.

Reasons for recommendations

It is a very early stage in the programme (SRP). Castle Hill will give us valuable experience and insight of what to expect from future projects and should a different approach be required for future projects, a report can be produced for the consideration of this Forum.

Impact of funding, targets and milestones

Funding the resource required to deliver this programme will ensure that the maximum benefit can be realised for our schools and pupils. It will ensure that our projects can be delivered as early as possible within the programme and that we address associated issues around school organisation. In due course it will also release Capital Maintenance funding for use on other schools which are not part of the programme.

Resource implications

In terms of additional staffing resource, we have been able to recruit to one of two posts previously agreed by the Forum in order to support this work and will look to readvertise the remaining post in the new year.

Appendices

None

Schools Forum

Work Programme 2023/24

Prepared by

Paul Tinsley, Interim AD Education and Inclusion

*Reports are to be condensed to two pages where possible and appendices can be available from the report holder on request

Meeting date	Reports	Officer	Report for:	Deadline for papers
Meeting 19th October 2023	Confirm if allocating £2k (previously 1k) to Debby for Governor Support 23/24 due to increased workload	Paul Tinsley	Consultation / Decision	Deadline 4 th October 12pm
	School Forum Constitution 4 Academy Vacancies - a secondary headteacher, a secondary governor and 2 bursars, appoint another union rep	Tony Guise	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 David Graham	Decision	
	Indicative School Funding 2024-25 report	Jane Davy	Consultation	
Meeting 18th January 2024	Update on maintained school balances Report	Jane Davy	View/Information	Deadline 19 th December 12pm
	Update on School Funding and Growth Fund Report	Jane Davy	View/Information	
	De-delegation of Unions Facility Fees Report	Lisa Davies	Decision	
	Review of Schools Forum Constitution	Ian Hughes	Consultation / Decision	
	High Needs Block Recovery Plan for DfE and Capital Planning and Hub Model Report	David Graham	View/Information	
	Early Years Funding Formulae and Centrally Retained Funds 2024/25 Report	Martyn Sharples	View/Decision	
	Approval of Central Block Expenditure for 2024/25 Report	Steve Drake Martyn Sharples	Decision	
	De-delegation of School Improvement Report	Connie Beirne	Decision	
	Update on Schools Rebuilding Programme Report	Richard Morse	View/Information	