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**Service Director – Legal, Governance and
Commissioning**

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Thursday 17 June 2021

Notice of Meeting

Dear Member

Kirklees Schools Forum

The **Kirklees Schools Forum** will meet in the **Virtual Meeting - online** at **10.30 am** on **Friday 25 June 2021**.

The items which will be discussed are described in the agenda and there are reports attached which give more details.

A handwritten signature in black ink, appearing to read "Julie Muscroft", on a light-colored background.

Julie Muscroft

Service Director – Legal, Governance and Commissioning

Kirklees Council advocates openness and transparency as part of its democratic processes. Anyone wishing to record (film or audio) the public parts of the meeting should inform the Chair/Clerk of their intentions prior to the meeting.

Agenda

Reports or Explanatory Notes Attached

Pages

1: Apologies for absence

2: Minutes of the Schools Forum meeting held on 5th March 2021

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Minutes of the Forum held on 5th March 2021

3: Matters arising from 5th March 2021 meeting

4: Education Learning Partnership Board (standing item)

Verbal Update

5: Dedicated Schools Grant Outturn

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a) Dedicated Schools Grant Outturn

- The DSG account
- Maintained school balances
- Schools with excess balances
- Schools with deficit balances

b) School contingency

c) High need (standing item) – Verbal Update

d) School reorganisation

6: Any other business

Any other business

- Plans for next academic year
 - Forum membership
-

7: Confirm minutes

8: Dates and times of next meetings

The Kirklees Schools Forum

Meeting Schedule Academic Year 2020/21 Venues: To be confirmed

2020/21 Meeting Schedule

Date	Meeting	Times	Venue
11 September 2020	Forum (Briefing)	9.30 – 11.30am	On-line Teams meeting
25 September 2020	Forum (Reserve)	9.30 – 11.30am	On-line Teams meeting
16 October 2020	Forum (Briefing) Forum (Public)	9.30 – 10.30am 10.30 – 11.30am	On-line Teams meeting
13 November 2020	Forum (Briefing)	9.30 – 11.30am	On-line Teams meeting
27 November 2020	Forum (Briefing) Forum (Public)	9.00 – 10.20am 10.30 – 11.30am	On-line Teams meeting
11 December 2020	Forum (Reserve)	9.00 – 11.00am	On-line Teams meeting
08 January 2021	Forum (Briefing)	9.00 – 11.00am	On-line Teams meeting
22 January 2021	Forum (Reserve)	9.00 – 11.00am	On-line Teams meeting
05 February 2021	Forum (Briefing)	9.00 – 11.00am	On-line Teams meeting
05 March 2021	Forum (Briefing) Forum (Public)	9.00 – 10.00am 10.00 – 11.00am	On-line Teams meeting
26 March 2021	Forum (Reserve)	9.00 – 11.00am	On-line Teams meeting
30 April 2021	Forum (Briefing)	9.00 – 11.00am	On-line Teams meeting
28 May 2021	Forum (Briefing)	8.30 – 11.00am	Tbd
25 June 2021	Forum (Briefing) Forum (Public)	8.30 – 10.00am 10.00 – 11.00am	Tbd
09 July 2021	Forum (Reserve)	8.30 – 11.00am	Tbd

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THE KIRKLEES SCHOOLS FORUM

meeting held on Friday 5th March 2021

10:30am on Microsoft Teams

Present:

	Nursery School Heads (1)
Helen Pearson, Jenny Shore, Martin Vayro, Diana Wilson	Primary School Heads (5)
	High School Heads (1)
	Special School Heads (1)
Laura Flynn	Special Academy Heads (1)
Darren Christian (Chair), Catherine Jubbs,	Academy Heads (4)
Rebecca Smith	Pupil Referral Units (1)
	Kirklees Governors (1)
Paula Wescott (NASUWT)	Non-school members (5)
David Gearing (Financial Delegation Manager); [Minute Clerk]	Officers in Support
Natalie McSheffrey – Head of Education Relationships & Business	
	Observers

1. Apologies for absence

Apologies had been received from Louise Brown (Primary School Heads), Karen Colligan (High School Heads), Hazel Danson (NEU), Michelle Lee (Academy Heads), Cllr Carole Pattison (Portfolio Holder, Learning, Aspiration & Communities) and David Wadsworth (Academy Heads).

2. Minutes of the Schools Forum Public meeting held on 27th November 2020

The minutes were agreed to be a true record of the meeting.

3. Matters arising from the Schools Forum Public meeting 27th November 2020

3.1 School trade union facilities time arrangements (minute 3.4 of 27th November)

An agenda item will be scheduled in the Summer term to pick up outstanding issues.

3.2 Review of local specialist places (minute 3.6 of 27th November)

It is understood that Jane Friswell's report on specialist place sufficiency has now been submitted. A briefing will be provided to Forum.

3.3 Annual Cabinet report on School Funding (minute 9 of 27th November)

The 2021-22 funding report was agreed at the 19th January Cabinet meeting.

4. Council-arranged insurance for schools and the DfE Risk Protection Arrangement

This item had to be deferred to the Schools Forum Briefing meeting set for 26th March 2021, due to the Council's Risk & Insurance Manager having to participate in an important Court application affecting the Council that unfortunately coincides with this meeting.

5. Kirklees Education & Learning Partnership Board

Natalie McSheffrey fed back about the Board meeting that had taken place on 24th February 2021.

An update was provided to the Board about the High Needs 10-point plan and progress being made. A refresh of the plan will be shared and brought back to the next KELPB meeting. The commission of Impower Consultancy to work with the LA and schools on SEND improvement was discussed.

A presentation on the Mental Health Trailblazer Project had been delivered by Jayne Whitton (Principal Educational Psychologist) and Stewart Horn (Head of Joint Commissioning, Children & Families Service). The project is garnering positive reviews from schools. The Board also looked at the Alex Timpson Attachment and Trauma Awareness in Schools programme which is delivering positive outcomes and considered the opportunities for that to continue.

Val Flintoff [Learning Partner (System Leadership)] briefed the Board about the work programme dealing with Relationships, Sex and Health Education. The meeting also considered the government's 'roadmap' out of lockdown restrictions, in particular the return to school opening on 8th March. An update on the digital learning strategy was also given including an update on the impact of devices provided to schools – around 6,500 laptops have been delivered across all schools.

6. High Needs Budget

Picking up on the minutes of the last meeting it was confirmed that Kelsey Clark-Davies has now started in Kirklees as the new Head of Service for Education Safeguarding & Inclusion.

It was reported that the Cabinet report which proposes revised mainstream high needs top-up funding arrangements from April 2021 is on course to be formally considered by the Council's Cabinet on 16th March. The report has been considered by both the Children's Service Leadership Team and the Council's Executive Team and both meetings provided useful suggestions as to how to refine the report.

The Education & Skills Funding Agency has recently launched a consultation about the future operation of the High Needs National Funding Formula. The main thrust of the consultation is to examine how the historic spending element of the High Needs NFF could be changed in future. Presently, the historic funding element references what each local authority planned to spend on high needs costs in financial year 2017-18. At that stage in proceedings high needs spending pressures had just begun to surface. The consultation looks at the potential for replacing the planned high needs spending figure in 2017-18 with what local authorities actually spent that year. This would increase Kirklees' historic spending factor allocation by around £2m. The consultation also looks at the proportion of the total High Needs budget that the historic spend element accounts for. Originally it was 50% of the total but, thanks to enhancements to the national high needs budget over time, the historic spend element now amounts to just 34% of the total allocated. The consultation paper gives an example of increasing the proportion to 40% - this could add another £3.5m to Kirklees High Needs allocation were it to happen.

The ESFA has recently requested information about historic expenditure on Resourced Provisions as that wasn't overtly part of the budget information collected through national

data returns. Whether that will have a further beneficial effect on Kirklees' historic expenditure factor remains to be seen.

7. Ongoing (financial) implications for schools arising from the Covid-19 health emergency

The Education & Skills Funding Agency has provided some support to schools since the first lockdown in March 2020 to address additional Covid-related expenditure. However, that support was limited to the Summer term of 2020 and only against headings specified by the Department. It now appears very unlikely that further financial support will be provided via the ESFA. Conversations are taking place between Council officers exploring the possibility of providing some direct financial support to those schools most adversely affected by higher levels of unreimbursed Covid spending and/or lost parental income. Officers will be looking to identify potential underspends within the Schools DSG and direct grant funding received by the Council to provide the necessary financial support. It is appreciated that there is a need to confirm arrangements to schools as soon as possible now that they have begun to pull together budget plans for the new financial year.

The question is how should the financial impacts of Covid be identified? Back in November of 2020, all schools and academies in Kirklees were written to asking them to provide details of Covid-related expenditure and related lost parental income. Over 80% of schools were able to supply the requested details. Realistically there just isn't the time or work capacity to bring that information up to date so how do we effectively target any funding support to the schools where it is most needed? It was suggested that some form of bidding process could be opened up for schools to make a claim backed up by evidence to be provided by the school. The effect of the latest lockdown period from the start of January 2021 was mentioned – one head teacher said that his school's budget was heading for problems until the latest lockdown period which had curtailed the school's accumulation of Covid spending. This may well sort difficulties for some schools but the November exercise had pointed to a number of schools experiencing "budget-busting" financial pressure.

8. Details of the 2021-22 DSG settlement and the shape of school funding for 2021-22

The Central Schools Services Block 2021-22

The table below shows the final position for the CSSB in 2021-22 and replaces the estimated picture showing in the Forum minutes of 27th November 2020.

Budget	2020-21	2021-22
Servicing of Schools Forum	£31,000	£31,000
Historic DSG pension commitments	£170,400	£170,400
Schools Admissions	£401,900	£401,900
School Organisation & Planning	£139,600	£139,600
School Reorganisation	£292,000	£292,000
National Copyright Licence charge	£331,100	£330,900
Statutory and regulatory duties for all children	£886,200	£874,100
Former Teachers Pay and Pension Grant in respect of centrally-employed Teachers		£36,300
Total	£2,252,200	£2,274,500

The Dedicated Schools Grant settlement figures for 2021-22 were released a couple of weeks after the November Schools Forum meeting. For the record the summary figures below show the 2021-22 funding blocks compared to their 2020-21 equivalents.

DSG Element	Fin Year 2020-21	Fin Year 2021-22	Difference
Schools Block	£302.18m	£324.48m	+\$22.3m
Growth Funding addition	£1.59m	£1.65m	+\$0.06m
Central Schools Services Block	£2.25m	£2.27m	+\$0.02m
High Needs Block	£43.17m	£48.82m	+5.65m
Early Years Block (interim)	£28.64m	£29.30m	+\$0.66m
Overall DSG total	£377.84m	£406.54m	+\$28.70m

The Schools Block increase includes £13.58m of former Teachers Pay Grant and Teachers Pension Employer Contribution Grant funds moved into the Dedicated Schools Grant. The underlying increase in funding for schools is £8.72m which represents a 2.88% increase on the previous year.

The Growth addition supports the operation of a Pupil Growth Fund and is also being used to allocate further funds to secondary schools and academies which agree to admit additional pupils at the request of the local authority to address higher levels of demand for school places as the local birth bulge works through into the secondary years.

The High Needs Block increase should be viewed in the context of significant pressures in the High Needs account. An overspend in excess of £20m will have been accumulated by the close of the current financial year. The increase in High Needs funding will be helpful in slowing down the rate of accumulation of the deficit.

The Early Years Funding Block figure released in December is always an interim one and is revised in the New Year once January census data is available. Although the interim figure for 2021-22 shows a £0.66m increase compared to the equivalent release a year ago the confirmed 2021-22 figure could be quite different given the potential for the pandemic to have affected the numbers of children registering for early years provision.

The 2021-22 funding distribution to mainstream schools

Amongst the agenda papers today was a comparison of the schools funding allocation in 2021-22 with the equivalent figures in 2020-21.

The largest single difference between the two years lies within the Basic Entitlement (Age-Weighted Pupil Unit) funding factor – an additional £19.69m has been allocated in 2021-22 and that against a background of 197 fewer pupils in the new year. This accounts for a large proportion of the overall £22.3m funding increase. It should be remembered that the 2021-22 AWPU rates include the transfer in of former Teachers Pay and Pension Grant funds - £180 has been included in the Primary AWPU and £265 in both Secondary AWPUs in 2021-22.

£2.46m more has been allocated in 2021-22 across the deprivation-related factors, free school meals and IDACI (Income Deprivation Affecting Children Index), reflecting rising rates of socio-economic disadvantage.

The minimum per pupil funding levels that have to be satisfied have seen an increase in the number of schools (30 to 45) receiving top-up funding to meet those levels in 2021-22 at an increased cost of £1.73m in comparison to 2020-21.

A number of funding factors have exhibited reductions in the amount of allocated funds in 2021-22 – approaching £1m less has been allocated across the English as an additional language, pupil mobility, business rates, premises rents and lump sum factors.

The 2021-22 funding allocation represents another significant step towards the National Funding Formula (NFF) in Kirklees. The 2020-21 distribution contained £10.6m of cash protection funding on top of the pure NFF factor value distribution. In 2021-22 the level of cash protection has fallen to £6.86m, which now sits wholly within the minimum funding guarantee factor, largely as a result of uplifts to the NFF factor values in 2021-22.

It was asked when the National Funding Formula will be fully imposed upon local authorities. The latest information indicates that schools will be directly funded by the NFF with effect from funding year 2022-23. However, the government has announced target dates for the change several times before without the change ever being made. The changeover to direct funding may raise fears amongst those schools in receipt of cash protection support through the minimum funding guarantee mechanism that that could disappear. That is unlikely to happen given how established the MFG is within schools funding arrangements and it may well assume even more significance in future for those schools within local authorities which are not as far along the path to adoption of the NFF structures.

9. Any other business

ESFA consultation launched on changes to the Sparsity funding factor

The ESFA has recently launched a consultation which looks at making changes to the Sparsity factor within the National Funding Formula. The factor is all about providing some financial support to (small) schools which serve isolated rural communities. The factor looks at the distance “as the crow flies” between a school and the nearest available alternative school. If that distance exceeds three miles then the sparsity factor can allocate funding with a view to helping the school continue to be viable, thereby protecting rural communities and preventing parents and children from having a longer distance to travel to another school. Although Kirklees has many rural areas within its borders, the distances between schools serving those rural communities all fall within the current three mile limit so no Kirklees school currently triggers sparsity support.

The consultation proposes to replace the “as the crow flies” distance with the actual mileage travelled by road between schools. This may bring some Kirklees schools within the sparsity definition but isn’t expected to produce a significant financial benefit.

The ESFA has recently been making reference to the wider issue of funding small schools in general. There is nothing concrete to report as yet. It might be useful, within the response to the sparsity consultation, to mention concerns about the ongoing viability of small schools in general and argue that there should be a more general small schools protection factor introduced to the National Funding Formula.

10. Date and time of next meeting

Friday 25th June 2021

10:00am start

Microsoft Teams

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Closure of Accounts 2020-21 - Primary & Special Schools

(-ve in red=deficits)

DfE Number	Final Balance 2020-21 £	As a Percentage of Annual Budget
3045	5,581	0.69%
2043	148,327	5.34%
3320	36,224	3.34%
3046	-37,919	-2.01%
2004	58,111	7.11%
2006	78,131	3.02%
2041	245,173	8.10%
3048	179,723	8.87%
3021	80,795	8.29%
3009	178,125	10.41%
2005	55,872	5.13%
2069	39,364	8.13%
2152	123,901	4.77%
2038	73,840	7.06%
3041	130,463	7.76%
3325	-7,348	-1.31%
2157	40,386	1.47%
3326	42,942	9.32%
2139	-79,316	-11.63%
2013	42,248	6.54%
3032	44,245	4.71%
2007	55,464	4.85%
2081	62,857	8.44%
3036	63,764	16.81%
2056	-25,555	-1.84%
1005	14,065	3.54%
3022	49,626	8.79%
2151	142,944	7.28%
2099	63,279	3.70%
3332	22,719	2.14%
2096	4,341	0.85%
2086	34,611	6.16%
3014	81,033	11.56%
2100	30,284	6.04%
3010	245,345	8.71%
3037	151,615	7.78%
2154	203,658	9.09%
2087	41,716	7.99%
2134	39,072	3.63%
3023	44,930	5.83%
2102	74,325	6.34%
2088	20,277	4.46%
2089	70,657	19.91%

2085	3,113	0.37%
3336	87,863	8.57%
2050	61,700	3.02%
2097	97,270	7.01%
2108	15,538	1.32%
2129	92,231	5.29%
2079	-60,788	-9.32%
3329	49,175	7.26%
2130	586	0.04%
3324	26,056	3.22%
2148	82,312	5.96%
2103	136,170	12.38%
3000	84,578	4.79%
2122	68,371	4.96%
2110	56,982	3.62%
2073	57,362	8.12%
3028	89,905	5.17%
2065	38,456	4.17%
2145	42,664	2.32%
3410	76,145	2.90%
2153	376,006	10.75%
2035	294,969	13.94%
3002	135,719	8.85%
2090	84,468	9.00%
2045	120,566	10.46%
2075	-21,647	-2.49%
2135	97,567	5.54%
2032	44,457	1.00%
3402	64,871	5.05%
2025	84,307	4.41%
2066	19,616	1.66%
2144	55,566	5.68%
2067	103,943	8.47%
3001	55,011	2.61%
2037	-34,650	-2.32%
2036	492,715	20.93%
3034	46,320	4.62%
2120	66,876	3.36%
3004	54,181	7.90%
2074	8,859	2.08%
2091	85,573	8.69%
2114	125,980	10.08%
2014	-16,298	-1.63%
2095	57,353	7.67%
3016	81,556	9.69%
3314	114,247	11.16%
2028	172,847	13.56%
3323	74,152	7.99%
3003	112,506	12.00%
3310	60,868	6.28%

3400	19,419	1.36%
3304	29,190	1.98%
3405	86,586	8.11%
3401	119,879	6.44%
3408	187,369	10.15%
3321	33,080	2.97%
3049	101,297	4.56%
3015	147,062	8.59%
3008	48,883	3.63%
3027	20,107	5.09%
2125	12,714	1.40%
2068	93,008	5.62%
2076	42,062	8.85%
2023	79,532	2.71%
3412	44,452	2.58%
2077	14,432	3.00%
2016	203,361	9.35%

Total Primary Schools	8,376,525	
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7011	-196,838	-6.23%
7005	111,268	2.90%
7010	211,723	5.95%
7001	268,585	6.81%

Total Special Schools	394,738	
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Total - Primary and Special	8,771,263	
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Closure of Accounts 2020-21 - Secondary Schools

(-ve in red=deficits)

DfE Number	Final Balance 2020-21 £	As a Percentage of Annual Budget
4613	467,526	8.66%
4019	-1,743,475	n/a
4046	1,082,825	13.60%
4009	440,135	7.45%
4801	1,017,506	23.56%
4061	673,003	9.71%
4057	237,653	4.09%
4500	872,823	14.40%
Total Secondary :	3,047,995	

SCHOOLS SHOWING AN EXCESS BALANCE AT 31st MARCH 2021

The Excess thresholds are 10% of budget in Primary schools and 8% of budget in Secondary schools

DfE No	Balance at 31 March 2021	Percentage of Budget	Excess Amount		Balance at 31 March 2020	Balance at 31 March 2019	Balance at 31 March 2018
Primary Schools							
2036	£492,715	20.93%	£257,342		£396,091	£275,533	£160,279
2089	£70,657	19.91%	£35,176		£58,452	£44,683	£26,740
3036	£63,764	16.81%	£25,826		£52,731	£50,018	£22,887
2035	£294,969	13.94%	£83,383		£131,117	£132,418	£115,115
2028	£172,847	13.56%	£45,396		£164,689	£121,500	£121,866
2103	£136,170	12.38%	£26,203		£104,885	£155,866	£119,736
3003	£112,506	12.00%	£18,769		£131,117	£184,091	£156,876
3014	£81,033	11.56%	£10,949		£55,214	£42,110	£49,786
3314	£114,247	11.16%	£11,844		£51,904	£26,595	£5,294
2153	£376,006	10.75%	£26,131		£322,711	£295,582	£308,365
2045	£120,566	10.46%	£5,349		£54,617	£29,598	£58,064
3009	£178,125	10.41%	£7,049		£113,209	£172,270	£148,008
3408	£187,369	10.15%	£2,812		£24,373	£11,408	£86,832
2114	£125,980	10.08%	£1,045		£84,508	£82,884	£100,019
Secondary Schools							
4801	£1,017,506	23.56%	£463,217		£791,275	£339,426	-£123,112
4500	£872,823	14.40%	£239,990		£756,320	£865,336	£578,431
4046	£1,082,825	13.60%	£446,084		£773,286	£497,447	£149,264
4061	£673,003	9.71%	£208,162		£315,447	£245,353	£1,091
4613	£467,526	8.66%	£35,514		£371,638	£297,396	£195,279

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Schools Showing a Deficit Balance as at 31st March 2021

DfE	Deficit at 31st March 2021	Percentage of Budget	Balance at 31st March 2020	Deficit at 31st March 2019
7011	-£196,838	-6.23%	-£339,754	-£447,504
2139	-£79,316	-11.63%	-£64,437	-£48,575
2079	-£60,788	-9.32%	-£82,408	-£29,748
3046	-£37,919	-2.01%	£29,944	£5,869
2037	-£34,650	-2.32%	£25,567	£76,481
2056	-£25,555	-1.84%	-£26,134	-£14,448
2075	-£21,647	-2.49%	-£40,460	-£17,312
2014	-£16,298	-1.63%	-£56,495	-£8,370
3325	-£7,348	-1.31%	£14,408	£15,836

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SCHOOL-SPECIFIC CONTINGENCY: SUMMARY OF EXPENDITURES DURING 2020-21**AVAILABLE FUNDS 2020-21**

De-delegation from the maintained mainstream schools sector	£521,299
Contribution from High Needs sector (re Special Schools & settings)	£179,500
Pupil Growth Fund	£1,337,500
Balancing figure in DSG account (mainly due to recoupment discrepancies)	£103,704
True Contingency level 2020-21	£2,142,003
Roll-forward of uncleared Schools Block account deficit 2019-20	-£106,300
Resources brought-forward from 2019-20	£0

A Total funds available 2020-21**£2,035,703****EXPENDITURE 2020-21**

1 Business Rates adjustments compared to funding provided / empty school property	£174,536
2 Empty Property Council Tax on tied-accomm caretaker houses (18 properties)	£33,042
3 Allocations from the Pupil Growth Fund (incl Secondary additional admissions)	£743,866
4 Lump Sum transition for amalgamated schools	£12,081
5 Severance costs in support of Schools in Financial Difficulty	£379,893
6 Formula funding adjustment: eg premises rental revisions	£4,887
7 Correction of errors, costs it would be unfair to ask the school to meet	£26,880

Total expenditure 2020-21**B Remaining Funds at Year End 2020-21****£1,375,185****A - B****£660,518**

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SCHOOL REORGANISATION EXPENDITURE 2020-21: FINAL SUMMARY

	Sectoral totals
PRIMARY	£148,568
SECONDARY	£492,773
SPECIAL	£0
Total Reorganisation expenditure 2020-21	£641,341
Less recurrent School Reorganisation budget	£292,000
Adjustment re overspend vs 2019-20 School Reorganisation budget brought forward	-£16,600
Supported from Contingency (Pupil Growth monies)	-£365,941
Outturn balance	£0

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