

# Public Document Pack



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

**Julie Muscroft**

Governance and Commissioning

PO Box 1720

Huddersfield

HD1 9EL

**Tel:** 01484 221000

Please ask for: Schools Forum Team

Email: [schools.forum@kirklees.gov.uk](mailto:schools.forum@kirklees.gov.uk)

Thursday 15 June 2023

## Notice of Meeting

Dear Member

### Kirklees Schools Forum

The **Kirklees Schools Forum** will meet in the **Willow Room, Cathedral House, St Thomas' Road, Huddersfield HD1 3LG** at **10.00 am** on **Friday 23 June 2023**.

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
<b>1: Apologies for Absence</b>	
<b>2: Minutes of the Schools Forum meeting held on 3rd March 2023</b>	1 - 2
<b>3: Matters arising from meeting held on 3rd March 2023</b>	
<b>4: Kirklees Education &amp; Learning Partnership Board (standing item)</b>  KELPB attendees – Verbal update	
<hr/>	
<b>5: DSG outturn including school balances</b>  David Baxter	3 - 6
<hr/>	
<b>6: High Needs Update</b>  Jo-Anne Sanders – Verbal update	
<hr/>	
<b>7: Any other business</b>	
<b>8: Confirm minutes</b>	
<b>9: Date and time of next meeting</b>  To be confirmed	
<hr/>	

## The KIRKLEES SCHOOLS FORUM PUBLIC

### (Schools Funding Consultative Group)

meeting held on **Friday 3 March 2023** at 10.00 am  
at **Cathedral House, Huddersfield**

**Present:**

Name:	Category of Membership:
Andi Gilroy-Sinclair	Nursery School Heads (1)
Helen Pearson, Diana Wilson, Laura Willimott, Louise Brown, Katie Pearson, Jenny Shore	Primary School Heads (5)
Darren Christian, Andrew Fell	High School Heads (1)
Paul Evans	Special School Heads (1)
	Special Academy Heads (1)
Michelle Lee (Chair), Dave Wadsworth, Ian Rimmer	Academy Heads (5)
	Pupil Referral Units (1)
Paula Wescott, Hazel Danson	Non-school members (5)
	School Governors (1)
Liz Kilner (minute clerk), Jo-Anne Sanders, Natalie McSheffrey, David Baxter, Martin Wilby, Emma Brayford,	Officers in Support
	Observers

Item	Title	Actions
1	<p><b>Apologies for Absence</b></p> <p>The Chair welcomed all to the meeting.</p> <p>Apologies were received from:</p> <ul style="list-style-type: none"> <li>• Kelsey Clark-Davies – Head of Inclusion &amp; Educational Safeguarding</li> <li>• Mel Meggs – Strategic Director for Children’s Services</li> <li>• Cllr Carole Pattison – Portfolio Holder</li> <li>• Sally Rawson</li> </ul>	
2	<p><b>Minutes of the Schools Forum Public meeting held on 11 November 2022</b></p> <p>The minutes of the above meeting were agreed as a correct record of the meeting.</p>	
3	<p><b>Matters arising from meeting held on 11 November 2022</b></p> <p>There were no matters arising for discussion.</p>	
4	<p><b>Kirklees Education &amp; Learning Partnership Board (KELPB)</b></p> <p>It was noted that the next meeting of the KELPB will be held on the 15 March 2023.</p>	
5	<p><b>Early Years Funding Formula 2023 – 2024</b></p> <p>(a) <u>Early Years Funding Formula 2023-24</u></p> <p>The Early Years Funding Formula 2023-24 document was circulated before the meeting.</p> <ul style="list-style-type: none"> <li>• A consultation has now been completed on the 3 Model options                             <ul style="list-style-type: none"> <li>- Model 1 – Maximise base rates.</li> <li>- Model 2 – Introduce a quality supplement.</li> </ul> </li> </ul>	

	<ul style="list-style-type: none"> <li>- Model 3 – Increase deprivation supplement.</li> <li>• The results of the consultation were: <ul style="list-style-type: none"> <li>- Out of 395 providers there were 121 responses (response rate 31%)</li> <li>- 86% of responses were for Model 1 – maximise base rates and make no other changes to the funding formula.</li> </ul> </li> <li>• The recommendation is Model 1 based on the results of the consultation.</li> </ul> <p><b>Q. Do we need to endorse one of the model options today?</b> A. Yes and the recommendation is Model 1</p> <p><b>Q. Is Model 1 detrimental to the most vulnerable providers?</b> A. The amounts of money are not significant.</p> <p><b>Q. Does Model 3 target areas of greatest hardship?</b> A. Yes but some of what is gained from the supplement would be lost in the base rate. Amounts of money are minimal.</p> <p>It was noted that the members present approved the recommended Model 1 option.</p>	
6	<p><b>ESFA response to funding submission</b></p> <p>The ESFA Funding Update 2 March 2023 document was circulated before the meeting.</p> <p>David Baxter summarised the key areas of the report for the meeting.</p> <ul style="list-style-type: none"> <li>• The APT (Authority Proforma Tool) was submitted to the ESFA on 19 January 2023..</li> <li>• The Kirklees Council Safety Valve Block Transfer was approved on 28 February 2023 and Individual School Budget documentation derived from the 2023 2024 APT was issued to all maintained schools.</li> </ul>	
7	<p><b>Any Other Business</b></p> <p>(a) <u>Retirement</u></p> <p>Paula Wescott updated that she will be retiring in April 2023.</p> <p>Paula was thanked for all her work for Schools Forum and wished all the best for the future.</p>	
8	<p><b>Confirm Minutes</b></p> <p>The minutes of the previous meeting were confirmed above.</p>	
9	<p><b>Dates and times of next meeting</b></p> <ul style="list-style-type: none"> <li>• Friday 23<sup>rd</sup> June 2023      Public</li> </ul> <p>The Chair thanked everyone for attending the meeting.</p>	

Signature (Chair) .....

Date.....

<b>Service Area:</b>	Learning and Early Support / Schools Finance
<b>Presented By:</b>	David Baxter
<b>Report:</b>	Dedicated Schools Grant (DSG) Outturn 2022/2023
<b>Date:</b>	23 June 2023
<b>Purpose Of Report:</b>	To report the Dedicated School Grant Outturn for 2022/2023
<b>Is a Decision Required?</b>	No

## Kirklees Schools Forum Public

23 June 2023

### Dedicated Schools Grant (DSG) Outturn 2022/2023

#### 1. Introduction

- 1.1 The 2022/2023 balances of all maintained schools are produced from the finalised information produced from each individual maintained school and collated within the overall Local Authority financial ledger.
- 1.2 In addition to the individual school balances, both de-delegated and traded elements of the Dedicated Schools Grant (DSG) are managed centrally within the financial ledger operating against terms and conditions devised and agreed by Schools Forum for the benefit mainly for, but not exclusively, maintained schools.
- 1.3 The report also covers the overall DSG outturn for 2022/2023, including the funding resulting from participation in the Safety Valve programme.

#### 2. Individual School Balances

- 2.1 The balance for all maintained schools as at 31<sup>st</sup> March 2023 totalled £11.7million (£15.5 million 2021/2022). This includes the in year academisation of academisation of three schools and represents an overall reduction of £4.5million in balances, summarised in the Table below.

For year on year comparison purposes the balances held by the schools that transferred to academy status totalled £1.5 million, meaning that the net adjusted reduction in balances totalled £3.0 million.

Area	Number of Establishments	Combined Balance 31 March 2023
Primary Schools	99	£6.2 million
Special Schools	4	£0.8 million
Secondary Schools	6	£4.5 million
<b>Total</b>	<b>109</b>	<b>£11.5 million</b>

- 2.2 Further information covering the 'excess balances' for those schools which have exceeded the 10% (primary & special schools) and 8% (secondary schools) tolerance of their total budget will be agreed with each individual school, with any potential recoupment on these amounts then be considered at a future School Forum meeting.

### 3. Centrally Managed School Budgets

- 3.1 Both the de-delegation and the traded aspects of central school budgets are managed centrally on behalf of all schools. These fall into the following categories within the Financial Ledger and ultimately reconcile back to the approved de-delegation and agreed support rates and charges associated with Kirklees Business Solutions.
- 3.2 The overall effect on the DSG account for the above for 2022/2023 is a reported surplus of £51k. This is as a result of careful in year management of the interrelated accounts ensuring that appropriate mitigating cover was allowed for throughout the financial year.
- 3.3 The resulting surplus on this account is offset against the overall DSG deficit position as at 31<sup>st</sup> March 2023.

### 4. Overall Dedicated School Grant 31<sup>st</sup> March 2023

- 4.1 The overall DSG as at 31<sup>st</sup> March 2023 reports an overall carry forward deficit of £28.9 million which is an adverse movement from 31<sup>st</sup> March 2022 of £6.6 million from a reported deficit of £22.3 million comprised as follows in the table below:

Dedicated Schools Grant - Blocks	Net Budget £ million
High Needs	29.0
Early Years	-0.2
Schools and Central Schools and Services	0.1
<b>Net Dedicated Schools Grant Reserve Account</b>	<b>28.9</b>

- 4.2 In-year spend on High Needs in excess of the DSG funding allocation was £10.4m (equivalent in-year deficit in 2021/22 was £12.8m). The Council’s successful ongoing participation in the Round 2 Dedicated Schools Grant deficit reduction Safety Valve Programme resulted in a further payment of £4m in 2022/2023 (£13.5 m in 2021/2022) reducing the net overspend to £6.4 million. [Kirklees SV agreement \(publishing.service.gov.uk\)](https://publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1142122/kirklees_sv_agreement.pdf)

### 5. Next Steps

- 5.1 Schools Forum are asked to note the:
  - Final the impact on the financial position for the 2022/2023 Dedicated Schools Grant.
  - the overall balances on individual school accounts and consider what level of recoupment should be applied for 2022/2023; and
  - the overall outturn Dedicated Schools Grant 2022/2023, and the positive impact of the deficit reduction Safety Valve Programme on the overall finances for Kirklees Council.

This page is intentionally left blank