

# Public Document Pack



**Service Director – Legal, Governance and  
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Friday 23 February 2024

## Notice of Meeting

Dear Member

### Kirklees Schools Forum

The **Kirklees Schools Forum** will meet in the **Chestnut Room - Cathedral House, St Thomas Road, HUDDERSFIELD HD1 3LG** at **10.00 am** on **Friday 1 March 2024**.

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

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Pages

**1: Welcome, Introductions and Apologies for absence**

**2: Minutes of the Schools Forum Briefing held on 1st December 2023**

1 - 8

To approve the Minutes of the Schools Forum Briefing held on 1st December 2023.

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**3: Matters arising from the meeting held on 1st December 2023**

To discuss matters arising from the meeting held on 1st December 2023.

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**4: Kirklees Education & Learning Partnership Board (standing item)**

Kirklees Education & Learning Partnership Board (standing item)

Verbal Update / KELPB Attendees

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**5: High Needs Block (standing item)**

- Safety Valve
- Mainstream top-up funding review

Verbal update from Jo-Anne Sanders and John Bartlett

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**6: Summary of School Budget Share allocations 24-25 and the effects for schools**

David Baxter

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**7: Growth Fund monitoring update**

9 - 12

**Martin Wilby / David Baxter**

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**8: Any other business**

**9: Confirm Minutes**

**10: Next Meeting Date**

**Friday, 21<sup>st</sup> June 2024 – Briefing & Public**

Chestnut Room, Cathedral House, St Thomas Road, Huddersfield.

HD1 3LG

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## The KIRKLEES SCHOOLS FORUM PUBLIC

(Schools Funding Consultative Group)

### meeting held on **Friday 1<sup>st</sup> December 2023** at **10:00am at Cathedral House, Huddersfield**

**Present:**

Name:	Category of Membership:
	<b>Nursery School Head (0)</b>
Helen Pearson, Diana Wilson, Laura Willimott, Katie Pearson	<b>Primary School Head (3)</b>
Andrew Fell	<b>High School Head (1)</b>
	<b>Special School Head (1)</b>
	<b>Special Academy Head (0)</b>
Darren Christian (Chair), Dave Wadsworth	<b>Academy Head (2)</b>
Rebecca Smith	<b>Pupil Referral Unit (1)</b>
Hazel Danson, Vicky Morris	<b>Non-school Member (2)</b>
Matthew Pinder	<b>School Governor (1)</b>
David Baxter, Liz Kilner (Minute Clerk), Jo-Anne Sanders, Martin Wilby, John Bartlett, Fiona Denham	<b>Officers in Support (5)</b>
CLlr Elizabeth Reynolds	<b>Observers (0)</b>
	<b>Others (0)</b>

Item	Title	Actions
<b>1</b>	<p><b>Welcome, Introductions and Apologies for Absence</b></p> <p>The Chair welcomed all attendees to the meeting and introductions were completed.</p> <p>Apologies were received as follows.</p> <ul style="list-style-type: none"> <li>Jenny Shore – Maintained Primary</li> <li>Kath Duffy – Early Years PVI settings</li> <li>Andi Gilroy-Sinclair – LA Nursery School</li> <li>Ian Rimmer – Academy Head</li> </ul>	
<b>2</b>	<p><b>Minutes of the Schools Forum Briefing meeting held on 13 October 2023</b></p> <p>The Chair led the Group through the minutes page by page to ensure accuracy.</p> <p>The minutes were confirmed as an accurate record of the last meeting.</p>	
<b>3</b>	<p><b>Matters arising from meeting held on 13 October 2023</b></p> <p>There were not matter arising not covered on the agenda</p>	
<b>4</b>	<p><b>Kirklees Education and Learning Partnership Board (KELPB)</b></p> <p>The last KELPB meeting took place on 8 November 2023 and key areas were discussed, as follows.</p> <ul style="list-style-type: none"> <li>Councillor Reynolds updated the meeting with an overview of priorities.</li> <li>A programme plan for the priorities will be developed by Jo-Anne Sanders.</li> <li>There was an update from the Internal working group on fees and charges. There is a separate group looking at fees and charges for schools. This group is co-chaired by Jo-Anne Sanders. The difference in financial years for maintained schools and academies</li> </ul>	

	<p>was considered. This does cause duplication of processes and inefficiency. Alignment of financial years should be explored.</p> <ul style="list-style-type: none"> <li>• A top slice for maintained schools central services should be considered and explored as a model.</li> <li>• There was a discussion of the Early Years conference feedback.</li> <li>• There was a discussion of Adult Learning and feedback on good outcomes.</li> <li>• Exclusions were discussed. There have been a high number in the first half term of this academic year. The costs of spot purchase of day 6 provision are very high.</li> </ul> <p><b>Q. Exclusion day 6 provision is very expensive?</b> A. We do need to do practice learning. We want to provide schools with better provision to help schools to have a positive impact on the current cohort of children and their needs.</p> <p><b>Q. We do need more provision in schools?</b> A. The LA and schools do need to work together and ensure we have the right provision for children’s needs. We are still waiting the decision on the AP free school in the LA.</p> <p><b>Q. How many places do we expect the AP free school to provide if approved?</b> A. Circa 110 to 120 across all key stages.</p> <p><b>Q. Do we need more training for SENCOs and Head Teachers on how to deal with high needs children?</b> A. We expect this to be an outcome from the Task and Finish group.</p> <p><b>Q. When do we expect the AP free school decision?</b> A. This is dependent on ministers, we do have some indication that the decision could be made in 4 to 6 weeks.</p> <p>The Chair thanked everyone for their feedback.</p>	
5	<p><b>Central Schools and Services Block (CSSB) proposed Allocations 2024/2025</b></p> <p>The Central Schools and Services Block (CSSB) Allocation 2024/2025 document had been circulated before the meeting.</p> <p>David Baxter updated the meeting.</p> <ul style="list-style-type: none"> <li>• The paper refreshes the current position for the 2024 / 25 financial year.</li> <li>• This is the usual update that will be built into a Cabinet paper after approval by Schools Forum.</li> <li>• There is inflation of 5% build into allocations as appropriate.</li> <li>• The total limit for the allocation in £2.6m.</li> </ul> <p><b>Q. What is the historic DSG Pension Contribution?</b> A. This is an historic Kirklees commitment related to the costs of early retirement in the past.</p> <p><b>Q. The year-on-year change is lower that £80k?</b> A. Yes, the increase is £45k.</p> <p><b>Q. Why is the overall increase not 5%?</b> A. The 5% increase is only applicable to some elements of the allocation.</p> <p><b>RESOLVED:</b> That the proposed allocations of the CSSB for 2024/2025 be approved.</p>	

5	<p><b>Proposed Schools Block De-delegations for 2024/2025 - revised paper to be considered for approval</b></p> <p>David Baxter updated the meeting.</p> <p>De-delegation Proposals 2024/2025 – Schools Block Funding was circulated before the meeting.</p> <ul style="list-style-type: none"> <li>• It is proposed that the de-delegated rates for 2024/2025 are increased by a minimum of 11% with the exception of maternity/paternity contributions that is proposed to be increased by a minimum of 33%.</li> <li>• Responses from the consultation process were summarised for the meeting. It was noted that the consultation has gone to 104 schools with a low response rate of 18%.</li> <li>• Overall, the responses indicated acceptance of the proposals.</li> <li>• The significant increase in maternity / paternity contributions was noted but responses were supportive of this increase.</li> </ul> <p><b>Q. Why are costs for maternity / paternity the same for primary and secondary schools?</b></p> <p>A. Historically these have been the same.</p> <p><b>Q. Will there be a reply to all questions raised in response to the consultation?</b></p> <p>A. Yes we will respond.</p> <p><b>Q. How many schools received the consultation?</b></p> <p>A. 104.</p> <p><b>Q. Why was the response rate so low at 18%, we need to understand this?</b></p> <p>A. We did do a follow up with School Business Managers to try to increase the response rate.</p> <p><b>Q. When is the decision needed for the proposals from Schools Forum?</b></p> <p>A. The decision is needed to feed into the Cabinet report for the meeting of 24 January 2024. To achieve this, we need a decision from Schools Forum today.</p> <p><b>Q. The cabinet may have concerns about the low response rate to the consultation. The Cabinet does need confidence that it is making the rights decision. The comments from the consultation are very helpful for cabinet?</b></p> <p>A. We have sent out the consultation and followed up with School Business Managers. We could do follow up phone calls in future years.</p> <p><b>Q. Have changes been made as a result of consultation in previous years?</b></p> <p>A. No.</p> <p><b>Q. We can also take feedback from Heads meetings?</b></p> <p>A. Yes, we can.</p> <p><b>Q. What would happen if Schools Forum did not approve the proposals to increase de delegation rates?</b></p> <p>A. There would need to be cuts in services as there would not be sufficient funding in the central pot to provide the current level of services.</p>	
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	<p><b>ACTION:</b> A review is required to understand why the charges for maternity / paternity are the same for primary schools and secondary schools.</p> <p><b>ACTION:</b> Follow up phone calls should be built into the consultation process for future years.</p> <p><b>RESOLVED:</b> That the proposed revised allocations in de-delegated rates for the 2024/2025 financial year be approved.</p>	<p>DB</p> <p>DB</p>
<p>7</p>	<p><b>Growth Fund Principles and Criteria - revised paper to be considered for approval.</b></p> <p>(a) <u>Growth Fund Principles and Criteria</u></p> <p>Martin Wilby updated the meeting.</p> <p>Growth Fund Proposals – Principles and Criteria December 2023 was circulated before the meeting.</p> <ul style="list-style-type: none"> <li>• Proposals were summarised for the meeting. <ul style="list-style-type: none"> <li>- Officers will continue to allocate growth funding within these constraints and within the approved budget.</li> <li>- Officers will provide School Forum with monitoring information at least bi-annually. Should the Growth Fund budget be at risk of overspend, Officers will bring an exceptions report to Schools Forum at the earliest opportunity.</li> <li>- Schools Forum will act as an appeal body should a school disagree with an officer decision.</li> <li>- Any underspend at the end of the year will be reported to Schools Forum alongside the overall DSG position and associated proposals.</li> <li>- The principals and criteria will remain in place into future financial years until agreed otherwise by Schools Forum</li> </ul> </li> <li>• The Growth Fund is from the main schools block (all schools).</li> <li>• What to do with underspend will be a decision for Schools Forum. There will be visibility on overspends and underspends ongoing.</li> <li>• The proposals will help with financial planning and will provide clarity.</li> </ul> <p><b>Q. When will Schools Forum receive the next update on the Growth Fund?</b></p> <p>A. We expect the next updated to be early in the new year and then again in May / June 2024.</p> <p><b>ACTION:</b> Updates on the Growth Fund to come to Schools Forum early in the new year 2024 and again in May / June 2024.</p> <p><b>RESOLVED:</b> That the Growth Fund Proposals – principles and criteria be approved.</p>	<p>MW</p>
<p>8</p>	<p><b>High Needs Block</b></p> <p>(a) <u>Safety Valve Monitoring Update</u></p> <p>Jo-Anne Sanders and John Barlett updated the meeting.</p> <ul style="list-style-type: none"> <li>• The meeting with the DfE has been postponed by two weeks. This was a joint decision.</li> <li>• Meetings have been held with DfE advisors.</li> <li>• We do need to factor in adverse movements on forecasts.</li> <li>• Adverse impacts are due to.</li> </ul>	



	<ul style="list-style-type: none"> <li>- Impact of EHCP backlogs. Where plans are agreed we backdate payments to the compliance date.</li> <li>- SEND costs are £1m higher than expected. This is demand driven from children in Early Years.</li> <li>- Out of area costs have increased by £0.4m.</li> </ul> <p>• Overall, the increase in the deficit is forecast to be £6.4m. This results in a total in year deficit forecast of £13m (when added to the previous forecast in year deficit of £6.6m).</p> <p><b>Q. Will this impact on the LA staying in the Safety Valve programme?</b>  A. We do not know at this stage. We are trying to be honest and continue to work with DfE advisors.</p> <p><b>Q. Is there any update on the decision on the AP free school?</b>  A. There is still no news but we have assumed that this will be approved. The DfE advisor is being very supportive.</p> <p><b>Q. Do we know why the AP Free School decision is being delayed?</b>  A. It is a ministerial decision and due diligence has to take place.</p> <p><b>Q. Will the addition of another year in the Safety Valve Programme impact on individual schools?</b>  A. Potentially.</p> <p><b>Q. How much in year contribution were we expecting from Safety Valve funding?</b>  A. £4m. If we do not get this the total in year forecast deficit will increase to £17m.</p> <p>(b) <u>Mainstream top-up funding review</u></p> <p>Jo-Anne Sanders updated the meeting.</p> <ul style="list-style-type: none"> <li>• The Task and Finnish group have continued to meet.</li> <li>• Cluster proposals are being considered. Proposals consider location and the sharing of expertise.</li> <li>• The initial proposal has 18 clusters. The Task and Finnish group will feedback on the proposals for clusters.</li> <li>• The Biggest cluster is Shelley Pyramid.</li> <li>• The cluster proposals will be considered at the Task and Finnish group meeting next week.</li> </ul> <p><b>Q. Who will lead each cluster?</b>  A. We do have options. Clusters may be led by a nominated SENCO. Clusters may feed into area leads. Infrastructure will need to be put in place.</p> <p><b>Q. Will there be £18m funding for the 18 clusters?</b>  A. We do currently spend £18m and we need to understand how clusters could better use this funding. Support would be in place to wrap around the clusters.</p> <p><b>Q. When do we expect the Cluster proposal to come to Schools Forum?</b>  A. We will have another update at the next Schools Forum meeting.</p> <p><b>Q. Will a September start work with the financial year?</b>  A. We could make this work with adjustments. We do need time to put roles and infrastructure in place.</p> <p><b>ACTION:</b> A high level plan for clusters to be shared at a Schools Forum meeting on in the new year (Feb / March 2024).</p> <p>It was noted by the Chair that a lot of good work is going on.</p>	<p style="text-align: right;"><b>J-A S</b></p>
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	<p>(c) <u>SEND – The Big Plan</u></p> <p>The Big Plan was shown on screen for the meeting.</p> <p>Jo-Anne Sanders updated the meeting.</p> <ul style="list-style-type: none"> <li>• The SEND Strategy has now been refreshed to make it more accessible.</li> <li>• There were a lot of stakeholders engaged in the process.</li> <li>• The focus was Demand, Compliance and Sufficiency provision in the system.</li> <li>• There is a road map for key deliverables.</li> <li>• Wording has been simplified to be understandable.</li> <li>• A glossary will be put together by the 'Our Voice' team.</li> <li>• We will share The Big Plan with all stakeholders including schools and governors.</li> </ul> <p><b>ACTION:</b> The Big Plan to be circulated to all.</p>	<b>J-A S</b>
<b>9</b>	<p><b>Any Other Business</b></p> <p>(a) <u>Annual school funding cabinet report – overview and timeline</u></p> <p>David Baxter updated the meeting.</p> <ul style="list-style-type: none"> <li>• The Cabinet meeting is set for 24 January 2024.</li> <li>• The report is being drafted currently and will include decisions made at Schools Forum including Block De Delegations 2024/25, Growth Fund, High Needs and Early Years.</li> <li>• By the Schools Forum on 19 January 2024 the Cabinet Report will be live</li> </ul> <p>(b) <u>Staff Absence Insurance Scheme</u></p> <p>David Baxter updated the meeting.</p> <p>Staff Absence Insurance Scheme - Forecast 2023/2024 was circulated at the meeting.</p> <ul style="list-style-type: none"> <li>• There is a forecast overspend on the Staff Absence Insurance Scheme of £371k.</li> <li>• We need to consider options to balance the scheme as it must at least break even.</li> <li>• One proposal would be to reduce reimbursement rates by 25% backdated to September 2023. Any over recovery would be reimbursed to schools.</li> </ul> <p><b>Q. Is this scheme for maintained schools only?</b> A. Yes.</p> <p><b>Q. There is a risk that reduction in reimbursements could have a disproportionate impact on smaller schools?</b> A. Noted.</p> <p><b>Q. Could another option be an increase in the charge for the Staff Absence Insurance Scheme for all schools for the remainder of the financial year?</b> A. Yes this can be considered.</p> <p><b>Q. Are HR backlogs contributing to this issue?</b> A. Yes they could be.</p> <p><b>ACTION:</b> David Baxter to progress the proposal to increase charges to all schools for the Staff Absence Insurance Scheme for the remainder of the financial year.</p>	<b>DB</b>



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<b>Service Area:</b>	Schools Finance
<b>Presented By:</b>	David Baxter
<b>Report:</b>	ESFA Authority Pro forma Tool (APT) Final Submission 2024/2025
<b>Date:</b>	1 <sup>st</sup> March 2024
<b>Purpose Of Report:</b>	To report and approve the APT submission to the ESFA for 2024/2025.
<b>Is a Decision Required?</b>	Yes

### Kirklees Schools Forum - Public

1<sup>st</sup> March 2024

### ESFA Authority Pro forma Tool (APT) Final Submission 2024/2025

#### 1. Background information

1.1 The Education & Skills Funding Agency (ESFA) published both the final allocations for 2024/2025 and the Authority Pro Forma Tool model (APT) on **19<sup>th</sup> December 2023**. The APT is the process by which the funding allocations for the Schools Block are allocated ultimately to generate the individual school budgets for all mainstream schools in the Kirklees area.

#### 2. Draft Stages of the Authority Pro-Forma Tool (APT) Completion

2.1 The APT has been considered by Schools forum in line with the standard timetabled process commencing with the initial the planning version of the 2024/2025 figures that was issued in July 2023. The process for 2024/2025 included a variation issued in October 2023 as the ESFA had to make urgent amendments to the funding process that effectively reduced the proposed funding allocations.

2.2 Schools Forum considered a report on the revised funding proposals for 2024/2025 on 13<sup>th</sup> October 2023. A resulting virtual engagement process allowed schools the opportunity to challenge the draft funding proposals for 2024/2025 with a key focus on the proposed £2.6 million (increasing from £2.1 million in 2023/2024) Schools Block to High Needs Block transfer to support the Safety Valve process. The block transfer is still to be formally approved by the Secretary of State through the disapplication process, which was submitted in November 2023.

2.3 Additional reports covering de-delegations (maintained schools) , growth fund (all schools), central schools and services block, CSSB (all schools) have all been considered as part of the annual challenge and review process.

2.4 All the initial planning work was based on the October 2022 census data, which is the key driver within the APT model. This is updated to reflect the October 2023 census data in the final published allocations.

#### 3. Completion of the Final APT issued December 2023

3.1 The Final APT model issued on the 19<sup>th</sup> December 2023 for 2024/2025 aligns with the confirmed schools block funding including the updated census data that was completed in October 2023.

3.2 The APT model shows those elements considered by Schools Forum above with the final APT submission reflecting the following:

- The full £2.6 million (0.70%) block transfer (disapplication request submitted) to High Needs supporting the Safety Valve assumptions has been fully funded.

## Report for Schools Forum

- The minimum funding guarantee (MFG) will be set at 0.5%, which is in line with allowable range of 0% and 0.5%.
  - Premises 'lump sums' and split sites allocations have been increased to National Funding Formula (NFF) levels (previously modelled at minimum NFF levels) increasing allocations to all schools. Split site allocations have an impact on three schools.
  - The Growth Fund has been increased to £1.315 million (£1.2 million previously) which is closer to the National Funding Formula (NFF) assumption of £1.578 million and allows for a balanced APT.
  - De-delegations are applied at the rates agreed by Schools Forum.
  - All the key applicable National Funding Formula (NFF) rates have been applied in line with the guidance. Those highlighted in green in Appendix A denote the rates included within the APT.
- 3.3 The above components within the APT return are consistent with what has been agreed through the key stages of developing the 2024/2025 budget and ultimately results in a balanced DSG Schools Block budget for 2024/2025.
- 4. Recommendation**
- 4.1 Schools forum members are recommended to approve the final APT submission for the 2024/2025 financial year.

David Baxter  
Finance Manager  
27<sup>th</sup> February 2024

Factor	23-24 NFF including ACA	23-24 APT	Difference between 23-24 APT and 23-24 NFF	24-25 NFF including ACA	24-25 APT minimum	24-25 APT maximum
Primary basic entitlement	£3,394.54	£3,394.00	-£0.54	£3,562.61	£3,473.54	£3,651.67
KS3 basic entitlement	£4,785.77	£4,785.00	-£0.77	£5,022.85	£4,897.28	£5,148.43
KS4 basic entitlement	£5,393.86	£5,393.00	-£0.86	£5,661.96	£5,520.41	£5,803.51
Primary FSM	£480.08	£480.00	-£0.08	£490.08	£477.83	£502.34
Secondary FSM	£480.08	£480.00	-£0.08	£490.08	£477.83	£502.34
Primary FSM6	£705.11	£705.00	-£0.11	£820.14	£799.64	£840.64
Secondary FSM6	£1,030.16	£1,030.00	-£0.16	£1,200.20	£1,170.20	£1,230.21
Primary IDACI F	£230.04	£178.11	-£51.92	£235.04	£188.31	£240.92
Primary IDACI E	£280.04	£213.59	-£66.45	£285.05	£225.24	£292.17
Primary IDACI D	£440.07	£340.71	-£99.36	£445.08	£355.65	£456.20
Primary IDACI C	£480.08	£368.41	-£111.66	£485.08	£384.59	£497.21
Primary IDACI B	£510.08	£391.71	-£118.37	£515.09	£408.55	£527.96
Primary IDACI A	£670.11	£515.48	-£154.63	£680.12	£540.95	£697.12
Secondary IDACI F	£335.05	£257.73	-£77.32	£340.06	£270.47	£348.56
Secondary IDACI E	£445.07	£344.60	-£100.47	£450.08	£359.65	£461.33
Secondary IDACI D	£620.10	£478.56	-£141.54	£630.11	£502.72	£645.86
Secondary IDACI C	£680.11	£523.23	-£156.88	£690.12	£548.93	£707.37
Secondary IDACI B	£730.12	£562.07	-£168.05	£740.13	£588.88	£758.63
Secondary IDACI A	£930.15	£716.89	-£213.26	£945.16	£753.22	£968.79
Primary EAL	£580.09	£580.00	-£0.09	£590.10	£575.35	£604.85
Secondary EAL	£1,565.25	£1,565.00	-£0.25	£1,585.27	£1,545.64	£1,624.90
Primary LPA	£1,155.18	£1,155.00	-£0.18	£1,170.20	£1,140.94	£1,199.45
Secondary LPA	£1,750.28	£1,750.00	-£0.28	£1,775.30	£1,730.92	£1,819.68
Primary mobility	£945.15	£945.00	-£0.15	£960.16	£936.16	£984.17
Secondary mobility	£1,360.22	£1,360.00	-£0.22	£1,380.23	£1,345.73	£1,414.74
Primary lump sum	£128,020.48	£128,000.00	-£20.48	£134,422.85	£131,062.28	£137,783.42
Secondary lump sum	£128,020.48	£128,000.00	-£20.48	£134,422.85	£131,062.28	£137,783.42
Primary sparsity	£56,309.01	£56,300.00	-£9.01	£57,109.71	£55,681.96	£58,537.45
Secondary sparsity	£81,913.10	£81,900.00	-£13.10	£83,014.11	£80,938.76	£85,089.46
Middle-school sparsity	£81,913.10	£0.00	-£81,913.10	£83,014.11	£9,292.32	£85,089.46
All-through sparsity	£81,913.10	£0.00	-£81,913.10	£83,014.11	£9,292.32	£85,089.46
Split sites basic eligibility funding				£53,709.13	£52,366.40	£55,051.86
Split sites distance funding				£26,904.57	£26,231.96	£27,577.19
London fringe	1.0000	1.0000	0.0000	1.0000	1.0000	1.0000



<b>Service Area:</b>	Schools Finance
<b>Presented By:</b>	David Baxter
<b>Report:</b>	Central Schools and Services Block (CSSB) Allocations 2024/2025
<b>Date:</b>	1 <sup>st</sup> March 2024
<b>Purpose Of Report:</b>	To approve proposed 2024/2025 CSSB allocations.
<b>Is a Decision Required?</b>	Yes

## Kirklees Schools Forum - Public

1<sup>st</sup> March 2024

### Central Schools and Services Block (CSSB) Allocations 2024/2025

#### 1. Background information

- 1.1 The CSSB continues to provide funding for local authorities to carry out central functions on behalf of maintained schools and academies, comprising 2 distinct elements:
- ongoing responsibilities
  - historic commitments

#### 2. Central Schools and Services Block (CSSB) 2024/2025 Block Allocation

- 2.1 The CSSB allocations for the 2024/2025 compared to the 2023/2024 allocation are shown in the table below:

Kirklees Council CSSB Block Allocation				
Components	2023/2024	2024/2025	Year on Year Change	Comments
CSSB Unit of Funding	£37.33	£38.60	£1.27	3.4% increase
Number of Pupils	62,786.50	62,863.5	77	
Historic Commitments	£170,000	£170,000	0	2024/2025 bid was successful.
<b>Total CSSB</b>	<b>£2,513,989</b>	<b>£2,596,532</b>	<b>£82,543</b>	

- 2.2 The ESFA has protected any local authority from having a reduction that takes their total historic commitments funding below the total value of their ongoing prudential borrowing and termination of employment costs, in recognition of the time required for such costs to unwind. Kirklees Council has already submitted evidence (deadline was 27 October 2023) to support a bid for additional resources to meet estimated costs of nearer £206,000 (true cost £216,105 including High Needs and Early Years) for 2024/2025. This bid was successful.
- 2.3 The proposed CSSB Allocations for 2024/2025 are compared against the agreed allocations for 2023/2024 shown below:

<b>Budget Heading</b>	<b>Agreed Allocation 2023/2024 £</b>	<b>Proposed Allocation 2024/2025 £</b>	<b>Notes</b>
Servicing of Schools Forum	32,600	34,200	
Standing Advisory Council on Religious Education (SACRE)*	-	45,000	Previously contained within statutory and regulatory.
Pupil Admissions Service	396,800	416,600	EY & HN blocks contribute
School Organisation & Planning	137,900	144,800	
Finance Support Costs	12,100	12,700	EY & HN blocks contribute
Payroll Support Costs	14,700	15,400	EY & HN blocks contribute
Personnel Costs	8,400	8,800	EY & HN blocks contribute
School Reorganisation Support	307,300	322,700	
Historic DSG pension commitments	170,000	170,000	
Former Teachers Pay & Pension Grant funding in respect of centrally employed teachers – <i>Specialist Provision Coordination</i>	19,219	20,200	HN blocks contribute
Former Teachers Pay & Pension Grant funding in respect of centrally employed teachers - <i>Looked after children</i>	5,948	6,200	
Former Teachers Pay & Pension Grant funding in respect of centrally employed teachers – <i>Portex ICAN EYSEN</i>	13,033	13,700	HN blocks contribute
National Copyright Licence charge	386,833	386,833	Final amount to be confirmed.
Per pupil allocation to the Council in respect of statutory and regulatory duties for all children in Kirklees	1,009,156	999,399	
<b>TOTAL</b>	<b>£2,513,989</b>	<b>£2,596,532</b>	

\* re-allocated from per pupil allocation for statutory and regulatory.

- 2.4 It is proposed that the above allocations are inflated by 5% (reflecting approximate impact of the pay award) from the 2023/2024 agreed contributions. The national copyright licence charge will be updated once the rates are agreed centrally by ESFA with the balance of resources reflected within the ‘statutory and regulatory duties for all children in Kirklees.’

### 3. Recommendation

- 3.1 Schools forum representatives are recommended to approve the above proposed allocations of the CSSB for 2024/2025. These allocations completed are set in line with the Schools Operational Guide for 2024/2025 Annex 3 [Schools operational guide: 2024 to 2025 - GOV.UK \(www.gov.uk\)](http://www.gov.uk).

David Baxter  
Finance Manager  
27<sup>th</sup> February 2024

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<b>Service Area:</b>	Schools Finance
<b>Presented By:</b>	David Baxter
<b>Report:</b>	De-delegation Proposals 2024/2025 – Schools Block Funding
<b>Date:</b>	1 <sup>st</sup> March 2024
<b>Purpose Of Report:</b>	To approve proposed 2024/2025 de-delegation rates for maintained schools.
<b>Is a Decision Required?</b>	Yes

## Kirklees Schools Forum - Public

1<sup>st</sup> March 2024

### Maintained Schools

### De-delegation Proposals 2024/2025 – Schools Block Funding

#### 1. Background information

- 1.1 The Schools Operational Guide for 2024/2025 requires the Schools Forum to agree the De-delegated services for the upcoming financial year.
- 1.2 De-delegated services are for maintained schools only. Funding for de-delegated services must be allocated through the formula but can be passed back, or de-delegated, for maintained mainstream primary and secondary schools with Schools Forum approval.
- 1.3 De-delegation does not apply to special schools, nursery schools, or Pupil Referral Units (PRUs). Where de-delegation has been agreed for maintained primary and secondary schools, the ESFA's presumption is that the Local Authority will offer the service on a buyback basis to those schools and academies in their area which are not covered by the de-delegation.

#### 2. De-delegations proposal for 2024/2025

- 2.1 The cost of living pressures continues to impact on all aspects of service delivery within both schools and the services supporting schools. The National Joint Council have offered a pay award for one year at a flat rate of £1,925 for support staff backdated to 1<sup>st</sup> April 2023. The overall increase across service providers is therefore variable but is likely to equate to an average increase of approximately 5%.
- 2.2 The current approved de-delegated services and charge rates in operation for the 2023/2024 financial year are shown in the table below:

De-Delegation Description	Primary per pupil rate	Secondary per pupil rate	Notes
School Contingency	£13.95	£17.48	Used to correct funding errors, support schools facing emergencies, pick up costs it would be unfair to ask schools to meet, one-off financial interventions in schools in financial difficulty to help them secure necessary savings.
Free school meals eligibility checks	£1.08	£1.35	Customer & Exchequer service checks to identify children eligible to claim free school meals – helps schools maximise their deprivation-related funding
Maternity, paternity, and adoptive leave	£30.79	£30.79	Central payment of salary costs during these leave periods so the school only pays the replacement costs
Trade union facilities time	£6.01	£0.00	Pays for the release from schools of local TU officials to manage casework (competence, attendance, disciplinary etc) involving school staff
Public duties	£0.17	£0.21	School cover costs re staff on jury service, appearing as witnesses in court proceedings, serving as magistrates, serving as governors at another school etc
International new arrivals	£1.66	£2.08	Support to schools dealing with language-related issues of children admitted from different parts of the world
School Improvement Commissioning	£4.73	£12.61	Supports improvement interventions in schools – appropriate support to schools for the cost of implementing improvement action plans, brokering school-to-school support by meeting the cost of releasing staff from other schools to work with the school in need of support.
<b>TOTALS</b>	<b>£58.39</b>	<b>£64.52</b>	

- 2.3 The de-delegation rates are reviewed annually with the proposed rates circulated to all maintained schools for consideration as part of an ongoing engagement and consultation process. The responses were considered alongside the final Authority Pro-Forma Tool (overall allocation of 2024/2025 school finances) in January 2024.
- 2.4 The De-delegations represent probable future costs of service provision for 2024/2025 and needs to consider the impact of both inflationary pressures and academisation which reduces the number of schools contributing to the de-delegated services.

### 3. Proposed de-delegation rates for 2024/2025

- 3.1 Three key components underpin the proposed de-delegated rates for 2024/2025. Firstly, using the October 2023 census data, the number of maintained pupils in 2024/2025 is anticipated to reduce by in excess of 3,000 due to proposed academisations. This is split across primary schools 9% and secondary schools 16% and equates to a reduction in de-delegation amounts totalling £188k.
- 3.2 Secondly the impact of the proposed flat rate pay award from April 2023 of £1,925 equates to an overall 5% service provider impact.
- 3.3 Finally, the level of financial support required for the maintained schools is currently in excess of the overall de-delegation, with in year (2023/2024) forecast overspends of £180k for Maternity / Paternity support and £125k for trade union contributions.
- 3.4 Taking all these factors into account, it is proposed that the de-delegated rates for 2024/2025 are increased by a minimum of 11% with the exception of maternity/paternity contributions that is proposed to be increased by a minimum of 33%. These would equate to the following per pupil charges in 2024/2025:

De-Delegation Description	Primary per pupil rate 2023/2024	Proposed Primary per pupil rate 2024/2025	Secondary per pupil rate 2023/2024	Proposed Secondary per pupil rate 2024/2025
School Contingency	£11.37	£12.62	£14.25	£15.82
Voluntary Early Retirement (VER)	£2.58	£2.86	£3.23	£3.59
Free school meals eligibility checks	£1.08	£1.20	£1.35	£1.50
Maternity, paternity, and adoptive leave	£30.79	£40.95	£30.79	£40.95
Trade union facilities time	£6.01	£6.67	£0.00	£0.00
Public duties	£0.17	£0.19	£0.21	£0.23
International new arrivals	£1.66	£1.84	£2.08	£2.31
School Improvement Commissioning	£4.73	£5.25	£12.61	£14.00
<b>TOTALS</b>	<b>£58.39</b>	<b>£71.58</b>	<b>£64.52</b>	<b>£78.40</b>

3.5 The proposed de-delegated rates have been circulated to all maintained schools as part of the annual consultation / engagement process. The outcome from the process was shared with Schools forum members on 1<sup>st</sup> December 2023.

**4. Recommendation**

4.1 Schools forum (maintained schools representatives only) members are recommended to approve the above proposed revised allocations in de-delegated rates for the 2024/2025 financial year.

David Baxter  
Finance Manager  
27<sup>th</sup> February 2024



<b>Service Area:</b>	Learning and Early Support / Schools Finance
<b>Presented By:</b>	Martin Wilby and David Baxter
<b>Report:</b>	Growth Fund update report
<b>Date:</b>	1 March 2024 (Public)
<b>Purpose Of Report:</b>	To update Schools Forum on Growth Fund spending and commitments with October Census confirmed
<b>Is a Decision Required?</b>	No

### Schools Forum Public – 1 March 2024

#### Growth Funding

A Dedicated School Grant Central Budget Retention 2023-2024 [for mainstream maintained schools and academies] has been agreed by Schools Forum for Growth funding:

#### Growth funding within the Schools Block

Budget provision	£	Notes
Pupil Growth Fund	600,000	Support in the KS1 primary school phase as per agreed principles and criteria.
Future pupil growth	600,000	Support for normal round bulge classes and permanent expansion as per agreed principles and criteria [current support is focused on bulge classes in the secondary school phase]
<b>TOTAL</b>	<b>£1,200,000</b>	

The following summary table presents the most up to date position of Growth Funding spending and commitments for 2023-2024 following the release of the October 2023 school census, upon which the majority of calculations are based:

	Budget	Spend/ Commitments	Balance
Pupil Growth Fund (KS1)	£ 600,000	£ 481,834	£ 118,166
Future pupil growth	£ 600,000	£ 685,317	-£ 85,317
<b>Total</b>	<b>£ 1,200,000</b>	<b>£ 1,107,240</b>	<b>£ 32,849</b>

A possible £14,000 commitment has been identified which is not included in the above table.

School level information is provided in two tables on the following pages.

### Pupil Growth Fund (KS1) 2023-2024 Interventions

School	Background information	Allocation
Birkby I & N School	KS1 Exceptional allocation – due to influx of INA pupils	£59,911
Clough Head School	KS1 class size issue (full year)	£23,308
Denby Dale First & Nursery	KS1 class size issue (full year)	£36,855
Hinchliffe Mill Junior & Infant	KS1 class size issue (full year)	£41,952
Holmfirth JI & N	KS1 class size issue (full year)	£31,297
Kirkburton First	KS1 class size issue (full year)	£15,544
Lydgate J & I	KS1 class size issue (full year)	£27,958
Marsden I & N	KS1 class size issue (full year)	£59,060
Oak Primary	KS1 class size issue (Summer Term only)	£10,177
Paddock J I & N	KS1 class size issue (full year)	£25,961
Pentland I & N	KS1 class size issue (Summer Term only)	£3,328
Roberttown CE Junior & Infant	KS1 class size issue (full year)	£35,947
Savile Town I & N	KS1 class size issue (full year)	£24,411
Scholes J & I	KS1 class size issue (full year)	£42,399
Wellhouse J & I	KS1 class size issue (full year)	£21,088
Wilberlee Junior and Infant school	KS1 class size issue (full year)	£22,638
<b>TOTAL OF 2023-24 ALLOCATIONS</b>		<b>£481,834</b>

## Report for Schools Forum

### Future Pupil Growth 2023-2024

School	2023-24		(A)cademy (M)aintained	LA Financial year 2023/24			
	2023-24 estimated growth fund	2023-24 Actual growth fund		2022-23 max growth fund Summer	2023-24 max growth fund Autumn	2023-24 max growth fund Spring	Total financial year 2023/24
Batley Girls High School	10	10	A	18,900	15,950	11,963	46,813
Castle Hall Academy	5	5	A	18,900	7,975	5,981	32,856
Manor Croft Academy	30	30	A	56,700	47,850	35,888	140,438
Moor End Academy	5	5	A		7,975	5,981	13,956
North Huddersfield Trust School	30	27	M	-	43,065	32,299	75,364
Thornhill Community Academy, A SHARE Academy	20	24	A	18,900	38,280	28,710	85,890
Upper Batley High School	8	10	A	15,120	15,950	11,963	43,033
Westborough High School	20	10	M	26,460	15,950	11,963	54,373
Holmfirth High School	18	18	M	-	28,710	21,533	50,243
Honley High School	18	8	A	-	12,760	9,570	22,330
King James's School	5	4	A	-	6,380	4,785	11,165
Kirkburton Middle School*	4	4	A	-	6,380	4,785	11,165
Newsome Academy	5	5	A	-	7,975	5,981	13,956
Otherhall Learning Campus High School	20	20	M	-	31,900	23,925	55,825
Spandine Nook High School Academy	10	10	A	-	15,950	11,963	27,913
	208	190		154,980	303,050	227,288	685,318